

FP

FALL 2025

THE **END** OF DEVELOPMENT

by ADAM TOOZE





Where Capital Meets Purpose in Asia

Asia's Largest Membership Network Mobilising Capital for Impact

AVPN members collaborate to drive capital for long-term systems change in Asia through catalytic funds, blended finance and high-trust partnerships. From gender equity, health access to climate resilience, we build the scaffolding for lasting impact.

We don't just amplify capital, we align it with purpose.

Our Impact

600+ members across the world



Over USD 50 million impact capital mobilised

43 markets represented



Facilitated over 20K connections across the ecosystem



Expand your impact in Asia.
Join AVPN: avpn.asia/membership



@AVPN | @AVPN_ASIA | @AVPNasia | @AVPN_ASIA | info@avpn.asia

AVPN Limited is a registered charity in Singapore (UEN 201016116M)

FOREIGN POLICY

FALL 2025

Arguments

- 7** Netanyahu Is Getting What He Wants
DION NISSENBAUM
- 9** Don't Let Iran Become Another Iraq
JANE DARBY MENTON
- 11** Meet the New Middle East, Same as the Old Middle East
STEPHEN M. WALT
- 13** Nigeria Isn't Caving to Trump
OLAJUMOKE AYANDELE
- 15** China May Be Changing Its Nuclear Strategy
TONG ZHAO
- 17** Leashing Chinese AI Needs Smart Chip Controls
KYLE CHAN AND RAY WANG
- 20** Trump Is Pushing India to Submit to China
SUSHANT SINGH
- 22** Bangladesh's Democratic Aspirations Remain Just That
SALIL TRIPATHI
- 25** Trump Will Lose the Trade War
ROBERT D. ATKINSON
- 27** MAGA Is Not Isolationist
ADRIAN KARATNYCKY
- 30** Russia's War Is Also Cognitive
NATALIYA BUGAYOVA

32 Europe Has a France Problem

EOIN DREA

34 Russia's Submarine Plans Are Bad News for the West

ELISABETH BRAW

On the Cover

37 The Great Aid Hypocrisy

The West's development model was always a mirage. It's time for a realistic alternative.

ADAM TOOZE

44 De-Risking Into Oblivion

The scarcity of public finance is a political fiction.

DANIELA GABOR

48 The Rise—and Fall—of NGOs

From a '90s heyday to today's global crackdown.

SUPARNA CHAUDHRY

52 The Development Economist Who Wasn't

Once dismissed from the field he helped found, Albert O. Hirschman feels newly relevant.

DANIEL W. DREZNER

56 Foreign Aid as Self-Help

South-south cooperation, and its vexed history, is back on the agenda.

DAVID C. ENGERMAN

61 China's Lending Hand

Both the party and the public are reluctant to follow Washington's model of foreign assistance.

**HENRY TUGENDHAT
AND JAMES PALMER**

64 The World Needs Africa

Governments, civil society, and the private sector are redefining the terms of partnership.

NDIDI OKONKWO NWUNELI

Review

91 Pandamonium

How the United States helped create a truly political animal.

GLORIA DICKIE

95 A Post-Harvard World

Washington is ceding ground to Beijing on higher education.

HOWARD W. FRENCH

99 How China Captured Apple

A giant firm and a superpower have become deeply entangled.

BOB DAVIS

103 Beyond the Mother Tongue

Yoko Tawada's quietly radical theory of literature.

RHODA FENG

106 Global Fiction

Our favorite new novels.

CHLOE HADAVAS AND
ALLISON MEAKEM

Hungry Hegemon

110 When Vegetarian Turns Vigilante

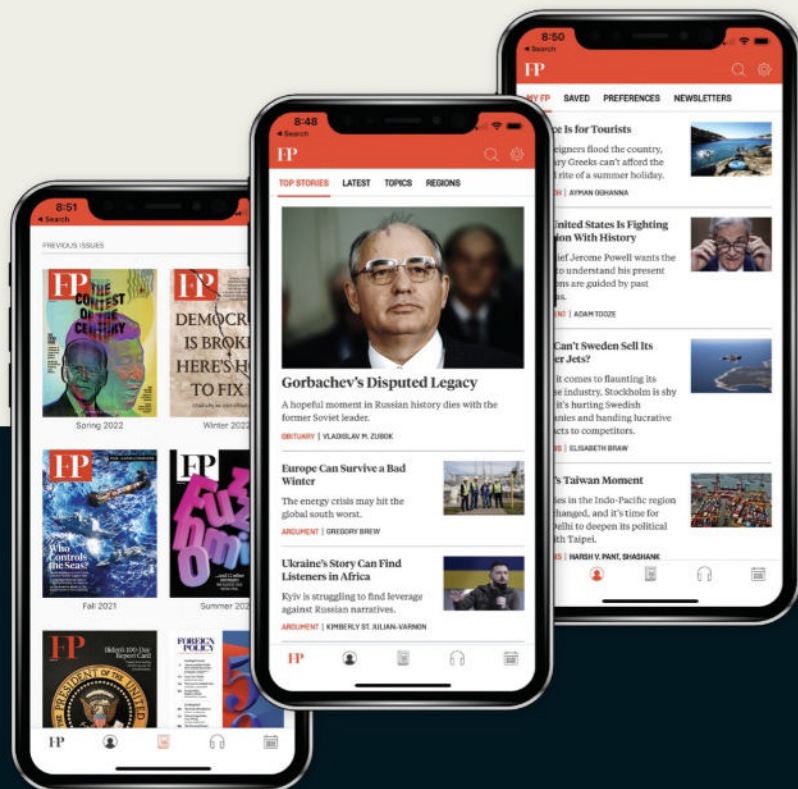
Strict dietary edicts have spawned a wave of hostility toward meat-eaters in Modi's India.

SALIL TRIPATHI

Quiz

113 What in the World?

DREW GORMAN



The FP mobile app is your guide to global affairs.

Dive below the headlines, anytime, anywhere.

MY FP | Configure a feed of content based on your preferences.

SAVED STORIES | Read later or offline.

PRINT MAGAZINE | Get the best digital experience.

FP PODCASTS | Listen all in one place.





Atlantic Council

Global Citizen Awards

Held on the margins of the United Nations General Assembly in New York, the Atlantic Council Global Citizen Awards celebrates the accomplishments of key global leaders seeking to improve the state of the world.

Honoring

H.E. Javier Milei
President of Argentina

H.E. Emmanuel Macron
President of the French Republic

Gianni Infantino
President, Fédération Internationale
de Football Association (FIFA)

**Register for the
livestream on September
24, 2025**



FEATURED CONTRIBUTORS



Tong Zhao is a senior fellow at the Carnegie Endowment for International Peace, in both the Nuclear Policy Program and Carnegie China.



Nataliya Bugayova is a nonresident Russia fellow at the Institute for the Study of War (ISW). She previously led ISW's Russia research team, where she helped build the analytical framework that serves as the foundation for ISW's reporting on Russia.



Daniela Gabor is a professor of economics at SOAS University of London and the author of the forthcoming book *The Wall Street Consensus*.



Suparna Chaudhry is an associate professor of international affairs at Lewis & Clark and the author of the forthcoming book *Civil Societies, Uncivil States: State Repression of NGOs*.



Ndidi Okonkwo Nwuneli is the president and CEO of the ONE Campaign.



David C. Engerman is a professor of history and global affairs at Yale University. He is the author or editor of six books, including, most recently, *Apostles of Development: Six Economists and the World They Made*.

Foreign Policy
655 15th St. NW, 3rd Floor,
Washington, DC 20005



PUBLISHING OFFICE (202) 728-7300
SUBSCRIPTIONS (800) 535-6343
ADVERTISING (202) 728-7310

Andrew Sollinger CEO AND PUBLISHER

EDITORIAL

Ravi Agrawal EDITOR IN CHIEF

EXECUTIVE EDITOR **Dan Ephron**

MANAGING EDITOR **Audrey Wilson**

CREATIVE DIRECTOR **Lori Kelley**

EXECUTIVE PRODUCER, FP LIVE **Dana Sherne**

DEPUTY EDITORS **Cameron Abadi, Nick Danforth, Amelia Lester, James Palmer, Stefan Theil, Jennifer Williams**

SENIOR EDITOR **Chloe Hadavas**

AUDIENCE ENGAGEMENT EDITOR **Elizabeth Miles**

SOCIAL MEDIA EDITOR **Rylie Munn**

ASSOCIATE EDITOR **Allison Meakem**

ASSISTANT EDITOR **Megan DuBois**

STAFF WRITERS **John Haltiwanger, Rishi Iyengar, Keith Johnson, Christina Lu, Sam Skove**

NEWSLETTER WRITER **Alexandra Sharp**

ART DIRECTOR **Sara Stewart**

STAFF DESIGNER **Brooks Robinson**

COPY CHIEF **Shannon Schweitzer**

DEPUTY COPY EDITORS **Drew Gorman, Syd Kuntz**

EDITORIAL FELLOWS **Anusha Rathi, Claire Schnatterbeck**

STRATEGIC PARTNERSHIPS

CHIEF PARTNERSHIPS OFFICER **Diana Marrero**

SENIOR VICE PRESIDENT **Susan Sadigova**

VICE PRESIDENT **Zach Pagovskii**

DIRECTORS **Emma Braithwaite, Afua Osei**

DIRECTOR, STRATEGIC ACCOUNTS **Claire Furbush**

STRATEGIC ACCOUNTS MANAGER **Sameen Ahmed**

SUBSCRIPTIONS

VICE PRESIDENT, SUBSCRIPTIONS AND MARKETING

Corinne Osnos

VICE PRESIDENT, GROUP SUBSCRIPTIONS AND STRATEGY

Tim Pippard

SENIOR MANAGER **Carly Metz**

GROUP ACCOUNT EXECUTIVE **Bryan Pearsall**

DIGITAL MARKETING SPECIALIST **Kay Langley**

FINANCE AND ADMINISTRATION

CHIEF FINANCIAL OFFICER **Courtney Friedman Kulatilake**

VICE PRESIDENT, PEOPLE **Laurel Fioravanti**

ACCOUNTING COORDINATOR **Asli Derib**

OPERATIONS COORDINATOR **Sofia Despian**

FP ANALYTICS AND EVENTS

Allison Carlson EXECUTIVE VICE PRESIDENT

FP ANALYTICS

SENIOR VICE PRESIDENT, RESEARCH **Mayesha Alam**

SENIOR ADVISOR **Antoine van Agtmael**

SENIOR POLICY ANALYST AND RESEARCH MANAGER

Isabel Schmidt

SENIOR POLICY AND QUANTITATIVE ANALYST

Angeli Juani

SENIOR POLICY ANALYST AND PROJECT COORDINATOR

Miranda Wilson

POLICY AND RESEARCH ANALYST **Jack Ronan**

FP EVENTS

VICE PRESIDENT **Julie Espinosa**

DIRECTORS **Masin Adams, Maggie Moore**

ASSOCIATE DIRECTOR, CONTENT AND PROGRAMMING

Katy Blake Burch-Hudson

EVENTS MARKETING MANAGER **Erin Dougall**

FP STUDIOS

VICE PRESIDENT, AUDIO **Rob Sachs**

SENIOR PRODUCER **Laura Rosbrow-Telem**

PODCAST PRODUCERS **Rosie Julin, Claudia Teti**

PRODUCT DEVELOPMENT AND DATA

VICE PRESIDENT **Jason Lee**

DIRECTOR, WEB DEVELOPMENT **Andrew Baughman**

SENIOR WEB DEVELOPERS **Zgjjm Gjonbalaj, Ash White**

WEB DEVELOPER **Tom Kyser**

DATA ANALYTICS MANAGER **Francis King**

© 2025 BY THE FP GROUP, a division of Graham Holdings Company, which bears no responsibility for the editorial content; the views expressed in the articles are those of the authors. No part of this publication may be reproduced in any form without permission in writing from the publisher. **SUBSCRIPTIONS & SUBSCRIBER SERVICES:** Foreign Policy, 655 15th St. NW, 3rd Floor, Washington, DC 20005; ForeignPolicy.com/subscription-services; email: support@foreignpolicy.com; (800) 535-6343 in U.S.; (845) 267-3050 outside U.S.; publications mail agreement No. 40778561. Rates (in U.S. funds): \$249.99 for one year. Back Issues: \$24.95 per copy; international airmail add \$3.00 per copy; online: ForeignPolicy.com/buy-back-issues; email: fp@foreignpolicy.com. **SYNDICATION REQUESTS:** Contact Andrew Sollinger at Andrew.Sollinger@foreignpolicy.com. **OTHER PERMISSION REQUESTS:** Copyright Clearance Center Inc. (978) 750-8400; www.copyright.com. **FP (ISSN 0015-7228) FALL 2025.** Issue No. 258 Published four times each year, in January, April, July, October, by The FP Group, a division of Graham Holdings Company, at 655 15th St. NW, 3rd Floor, Washington, DC 20005. Subscriptions: U.S., \$249.99 per year; Canada and other countries, \$249.99. Periodicals Postage: Paid in Washington, D.C., and at additional mailing offices. **POSTMASTER:** Send U.S. address changes to: 655 15th St. NW, 3rd Floor, Washington, DC 20005. Printed in the USA.

IT'S THE SEASON FOR SUMMITRY. For world leaders, this time of year involves deciding whether or not to attend the United Nations General Assembly, the Conference of the Parties (COP) climate talks, and various other confabs, such as the G-20 summit. If a head of state chooses not to travel to, in this case, the United States, Brazil, or South Africa, respectively, the question then arises of who to send instead, what signal that might send, and how that could impact relationships built over decades.

2025 brings several additional complications. For starters, the United States has not only withdrawn from but also denounced the U.N. Sustainable Development Goals, or SDGs, rendering a major component of U.N.-related discussions somewhat pointless. As a reminder, the SDGs include such innocuous ambitions as no poverty, zero hunger, and good health and well-being, to name just three of the 17 goals. The United States has once again pulled out of the Paris Agreement, too, which means Washington will no longer be bound by obligations to submit climate action plans or provide climate financing—reducing the COP meeting to little more than a talking shop and trade show. And then finally, there are significant doubts about whether the United States will choose to attend the G-20, leaving another major summit without the presence of the world's biggest economic power.

The demise of do-gooding multilateralism is just the starting point of our Fall 2025 issue, “The End of Development.” As FP economics columnist **Adam Tooze** argues in our lead essay, it's too easy to blame the kneecapping of global aid on the Trump administration's America First agenda (Page 37). Development has always been about power, Tooze argues as he indicts policymakers—on the left *and* right—for prioritizing national security interests above humanism and for seeing the rise of countries such as China purely as a threat (rather than as a more nuanced tale of a growth miracle with complications).

Macroeconomist **Daniela Gabor** builds on that point by critiquing the hopeful but doomed “Billions to Trillions” movement (Page 44), where public capital assumes the risk of development assistance. “The scarcity of public finance is a political fiction,” Gabor concludes. “The money exists. The institutions can be rebuilt. Only the will to reclaim them has been de-risked into oblivion.”

Could aid agencies fill development gaps? You may have heard they have their own troubles these days. **Suparna Chaudhry**, who studies NGOs, points the finger at governments around the world that saw



opportunity in repressing them (Page 48). As Chaudhry observes, the war on nonprofits is not restricted to the United States, though the decimation of the U.S. Agency for International Development has directly impacted many.

Moving into the realm of the possible, political scientist **Daniel W. Drezner** and historian **David C. Engerman** both find inspiration in the past. Drezner revisits the work of the forgotten father of development economics Albert O. Hirschman, whose contextual, country-driven approach looks newly relevant to a post-neoliberal world (Page 52). And Engerman discusses the vexed history of south-south cooperation and its return, for better or for worse (Page 56). Our cover package concludes with a look at who might fill the hole left by the United States on the global stage. **Henry Tugendhat** and FP's **James Palmer** interrogate China's aspirations in development (Page 61), and—striking a note of hope—**Ndidi Okonkwo Nwuneli** of the ONE Campaign makes the case that Africa is already leading with effective and just public-private partnerships across the continent (Page 64).

Lots more in the book, as always. Keep an eye out for our newest newsletter, Southeast Asia Brief, a weekly dispatch from Jakarta that will keep you informed on 11 countries in the region, from Indonesia to Thailand, the Philippines, Malaysia, Singapore, and beyond. Sign up on our website.

As ever,

A stylized, handwritten signature in black ink, appearing to read 'Ravi Agrawal'.

Ravi Agrawal



WORLD
HEALTH
SUMMIT

OCTOBER 12–14, 2025
BERLIN, GERMANY
& DIGITAL

Taking Responsibility for Health in a Fragmenting World

“Health progress of the past decades and multilateralism as we know it are under threat. The World Health Summit is the leading global platform bringing together science, politics, civil society, and the private sector to catalyze collaborative and innovative solutions for key health priorities. Join us at the #WHS2025 to take responsibility and shape solutions together.”

Carsten Schicker
CEO, World Health Summit

Register now



ARGUMENTS

MIDDLE EAST
& AFRICA



CHINA | ASIA & THE PACIFIC | AMERICAS | EUROPE



Israeli Prime Minister Benjamin Netanyahu in Jerusalem on Aug. 13.

Netanyahu Is Getting What He Wants

By Dion Nissenbaum

Israel's popularity in the United States is at an all-time low. World leaders are threatening to recognize a theoretical Palestinian state as a symbol of deepening distaste for Israel's intractable war in the Gaza Strip. Ireland, Lithuania, and Spain are among the countries that have indicated they might arrest Israeli Prime Minister Benjamin Netanyahu if he goes to those countries and haul him before the International Criminal Court on charges of

war crimes in Gaza. Violent antisemitism is hitting U.S. cities and rattling the country's Jewish communities. A rising chorus of Holocaust scholars, former Israeli leaders, human rights groups, Hollywood celebrities, and Israeli intelligentsia are calling Israel's war in Gaza a genocide. Images of starving Palestinian children have created a new surge of global condemnation for Israeli policies that continue to fuel a famine stalking thousands of Palestinians.

Things may seem bleak for Netanyahu. But the Israeli prime minister is getting just what he wants, and his ongoing war is advancing this Israeli government's long-term objectives: thwarting any prospects for the creation of a Palestinian state and expanding Israel's territorial borders.

The contours of Netanyahu's ambitions were clear in the days after the horrific Oct. 7, 2023, Hamas-led attack that left roughly 1,200 people dead and another 250 abducted and taken into Gaza to be used as bargaining chips.

From the start, Netanyahu's refusal to discuss a "day after" plan meant that, inevitably, the prime minister could fill the self-created void and reoccupy Gaza, as he is now setting out to do. Netanyahu laid out his three nos: No talks about creating a Palestinian state. No to returning the U.S.-backed Palestinian Authority to govern Gaza. No to an agreement to end the war without a total dismantling of Hamas.

By saying no to the United States and all other interlocutors that have sought to bring an end to the war, Netanyahu has put Israel on an inevitable path toward full military occupation of Gaza.

Israel has methodically destroyed Gaza's hospitals, universities, schools, and government buildings. It carried out a smear campaign against the United Nations and successfully sidelined that institution's decades-long aid efforts in Gaza, paving the way for armed private contractors favored by U.S. President Donald Trump to create a dystopian aid distribution effort that has led to hundreds of civilian deaths. And Netanyahu has unsuccessfully tried to empower Palestinian families with dodgy track records to challenge Hamas and supplant the PA as Gaza's next leaders. These Israeli policies have fueled more chaos in Gaza, creating a power vacuum Netanyahu now steps in to fill.

Thanks to Netanyahu, too, the debate has shifted from a question of when Israel will withdraw from all of Gaza to how much of Gaza Israel will

continue to occupy when the war ends. The Israeli military says it already controls 75 percent of Gaza—without being able to achieve the government's stated goals of crushing Hamas or rescuing the 20 remaining Israeli hostages believed to still be alive.

In the meantime, Israeli bulldozers have razed thousands of Palestinian homes along the established Gaza-Israel border, creating a self-declared "buffer zone" to be controlled by Israel. Israel has also razed thousands more homes along Gaza's established border with Egypt, ensuring that 2 million Palestinians are fully encircled by Israeli occupation. Israel has destroyed hundreds more homes to create a military corridor that cuts Gaza in half, creating two tiny dystopian Palestinian enclaves. Netanyahu is effectively seeking veto power over any Palestinian selected to run the newly created Middle East Bantustans. Amid all the disagreements over who, what, when, and where, Israel is talking about annexing parts of Gaza to further expand the country's borders.

World leaders can recognize a theoretical Palestinian state, but in reality, there is less and less to recognize every day.

When Hamas deposed the PA in Gaza in 2007, people dryly joked that Palestinians had finally gotten the two-state

solution they were demanding; it just wasn't the two-state solution they were expecting. The Hamas coup further fractured flickering Palestinian aspirations for a state of their own. Netanyahu worked with Qatar, Hamas's main financial backer, to pump billions of dollars into Gaza, where Palestinian militants openly trained for Oct. 7 under Israeli surveillance.

Israel occupies not just Gaza; it also retains military control in key parts of southern Lebanon, in violation of a U.N. cease-fire treaty. And it has refused to withdraw soldiers from southern Syria, where some of Israel's most ardent defenders argue that it is stepping in to prevent the new Syrian government from carrying out a "genocide" against the country's minority religious Druze community.

Israel's most steadfast loyalists have long painted Netanyahu as a well-intentioned prime minister who has been forced to make unpalatable decisions because he is beholden to the extreme members of his cabinet, National Security Minister Itamar Ben-Gvir and Finance Minister Bezalel Smotrich, who have both openly declared aspirations to use their immense government power to conquer Gaza and rebuild Israeli settlements.

Yet while global condemnation of Israel continues to grow, most Israelis



Palestinians struggling with severe food shortages gather to receive limited aid supplies near the Zikim crossing in northwestern Gaza on Aug. 8.

express little empathy toward Palestinians. A March poll found that more than 80 percent of Jewish Israelis supported forcibly expelling Palestinians from Gaza. A majority of Israelis in a July poll said they were untroubled by the famine Israel was fueling in Gaza. Netanyahu's personal popularity remains low, but just like Trump, the Israeli prime minister has neutralized all potential rivals who have tried to topple him.

There's a story I learned while writing a book about Jerusalem that seems especially germane to Netanyahu's current worldview.

When the 1948 war that created Israel's initial borders was coming to an end, Israeli and Jordanian officials used thick grease pens to carve up Jerusalem, with both sides steering around the city's U.N. compound, creating a small area "between the lines" that was controlled by neither side.

In 1957, nine years into the country's existence, Israeli civilians, soldiers, and bulldozers crossed into the area between the lines to enable the planting of 100,000 trees on 5,000 acres near the U.N. compound. Jordan objected to Israel's bold breach of international law and brought its case all the way to the U.N. Security Council.

Golda Meir, one of Israel's central political leaders who was then serving as foreign minister, refused to back down.

"We know that if we stop this one time, it is harder to start again later," Meir told members of the cabinet in August 1957. "I think that the best thing we can do is to finish quickly, at the very least, the work with heavy equipment. Indeed, bulldozers are not machine guns."

In language familiar to diplomatic reporters stationed in Washington and other world capitals, U.S. Ambassador Henry Cabot Lodge Jr. told the Security Council that the United States hoped that "both sides would refrain from taking any action between the

armistice lines that would tend to increase tensions."

In short, the U.N., the United States, and the world did nothing. And Israel kept bulldozing.

Israel has successfully employed the same strategy for decades, leading to the establishment of a Jewish settlement program in the West Bank that continues to use military control, ethnic violence, and deadly attacks (including against Americans) to expand its control over land once expected to be part of an independent state of Palestine. Israeli leaders are now talking about annexing large parts—if not all—of the West Bank, something the first Trump administration worked behind the scenes to prevent.

Netanyahu, like Trump the second time around, has learned that the bounds of his power are tested only when some other opposing force steps in to pose a serious challenge. Trump is giving Netanyahu the green light. The Israeli military has begun planning to carry out Trump's off-the-cuff plan to "voluntarily" depopulate Gaza of its 2 million Palestinians for redevelopment—an idea critics characterize as ethnic cleansing.

Like Trump, Netanyahu has repeatedly defied doomsayers who wrote his political obituaries. It became a cliché for writers to refer to Netanyahu by his nickname—"the magician"—every time someone declared his political demise and he emerged like a phoenix from the ashes. Israel's cataclysmic failures on Oct. 7, and in the years leading up to it, were supposed to be the nails in Netanyahu's coffin, sealing his demise as one of the nation's most reviled leaders for failing to prevent the worst attack in Israeli history.

Instead, Netanyahu has persuaded the United States to attack Iran's nuclear program, neutralized the long-feared Hezbollah missile threat from Lebanon, seized control of parts of Syria and Lebanon, floated plans

to annex parts of the West Bank, and launched plans to reoccupy Gaza.

Inch by inch, mile by mile, Netanyahu is expanding Israel's boundaries in violation of international laws because he faces no serious consequences for doing so.

And that part of Jerusalem between the lines where Israelis planted those contested trees in 1957 in violation of international laws? It's now known as Jerusalem's Peace Forest. ■

DION NISSENBAUM is a former Middle East correspondent and executive producer of the investigative documentary *Who Killed Shireen?*

Don't Let Iran Become Another Iraq

By Jane Darby Menton

In June, U.S. President Donald Trump suggested that U.S. and Israeli military operations had effectively closed the Iran nuclear file: "The only thing we'd be asking for [in future talks with Iran] is what we were asking for before, about 'we want no nuclear'—but we destroyed the nuclear." Yet even if the president's claims that Iran's uranium enrichment facilities have been "completely and totally obliterated" prove to be correct (and this is far from guaranteed), the conflict has ushered in a period of significant nuclear uncertainty, which threatens to fester if not swiftly addressed.

Iran's nuclear program has evidently been damaged, although it is unclear just how badly. Other developments are less reassuring. Iran appears to have retained custody over its stockpiles of highly enriched uranium, likely

enough to fuel multiple bombs if further enriched. As U.S. Vice President J.D. Vance told ABC News after the U.S. strikes, “We are going to work in the coming weeks to ensure that we do something with that fuel, and that’s one of the things that we’re going to have conversations with the Iranians about.”

Although Trump has questioned whether a new nuclear deal is necessary, in reality deft diplomacy will be needed both to facilitate peace and to prevent metastatic uncertainty about Iran’s residual capabilities from spawning crises for years to come. Such negotiations are rarely straightforward, especially with Tehran. Unfortunately, recent events have also undermined many of the tools and institutions that the United States and others have historically relied on to offset nuclear risks.

Tehran’s strategy of hovering at the nuclear threshold has clearly failed to deter external attacks, not only against nuclear facilities but also against regime and military targets. There is a real danger that this will harden its resolve to acquire nuclear weapons. If Iran does pursue the bomb, whether now or in the future, it will probably opt for proliferation pathways that are more difficult to monitor. Iran would not need to rebuild large-scale facilities

like Natanz or Fordow if it decided to sprint for the bomb, and smaller sites would be harder to reliably detect, even with exquisite intelligence. With access to highly enriched uranium, advanced centrifuge components, and skilled personnel (conditions that almost certainly apply right now), the current or a future regime could potentially reconstitute a nuclear weapons program in relatively short order.

Even if Iran’s nuclear weapons program is never resuscitated, assessing that these ambitions remain dormant will demand vigilance, resources, and attention for years to come. And Tehran, which has a track record of concealing nuclear activities, will struggle to convince the international community that it has given up the pursuit.

In this context, the evident deterioration of Iran’s relationship with the International Atomic Energy Agency (IAEA)—the global watchdog that safeguards civilian nuclear programs against misuse—is particularly troubling. The agency played a crucial role in past efforts to roll back Iran’s nuclear program, including in the implementation of the 2015 Joint Comprehensive Plan of Action (JCPOA). The JCPOA granted the agency unprecedented access to Iran’s nuclear program,

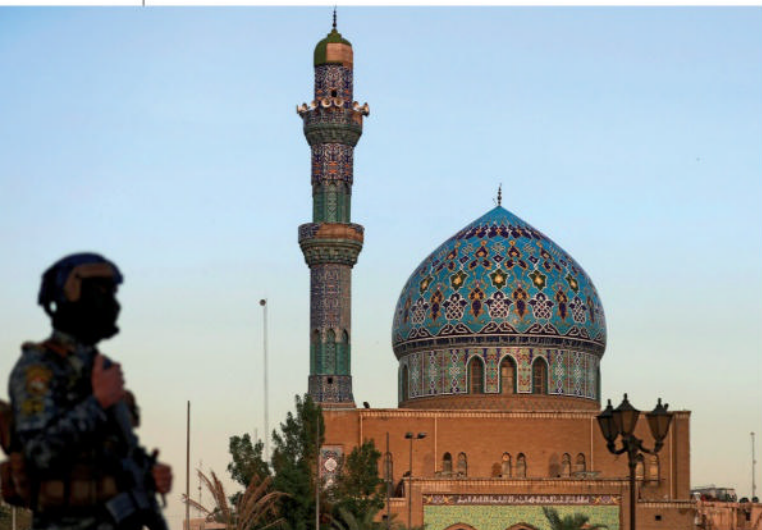
including facilities that were bombed.

Prior to the war, relations between Iran and the IAEA were already on a concerning trajectory. After the first Trump administration pulled out of the JCPOA in 2018 (Tehran was in compliance at the time), Iran started to progressively walk away from its own commitments under that agreement. In February 2021, the regime stopped implementing its Additional Protocol with the IAEA, a safeguards provision that expanded information-sharing and inspector access. It has also curtailed most JCPOA-specific monitoring requirements, which were designed to make covert activities harder to hide by enhancing oversight at multiple points in the nuclear fuel cycle.

Routine safeguards inspections have continued, providing some insight into Iran’s increasingly sophisticated program, although mounting intransigence prompted the IAEA’s Board of Governors to declare Iran to be in breach of its non-proliferation commitments on June 12. Israel launched its campaign the next day, and Vance cited the IAEA’s findings in the run-up to the U.S. strikes.

Although inspections were suspended during the conflict, the IAEA continued monitoring the situation to the best of its abilities and exhorting Iran to maintain its dialogue with the IAEA Incident and Emergency Centre. As IAEA Director-General Rafael Grossi told the U.N. Security Council, “Nuclear facilities and material must not be shrouded by the fog of war.”

Yet there are questions about what role the agency will be able to play going forward. At least for now, Iran remains party to the Nuclear Nonproliferation Treaty and is still bound by its Comprehensive Safeguards Agreement, which requires states to declare nuclear materials and facilities to the IAEA and allow inspectors to verify they are not being diverted for nefarious ends. Moreover, if Iran concedes to the Trump administration’s somewhat nebulous demands that it permanently



A member of the Iraqi Federal Police stands guard near the 17th of Ramadan Mosque in Baghdad on March 9, 2023.

give up nuclear weapons, the IAEA's technical expertise and familiarity with the program's history would be invaluable in assuring the international community that the capacity to weaponize cannot be easily reconstituted.

For Iran, however, cooperating with the IAEA may be politically contentious, especially after recent events, and a growing chorus of domestic malcontent augurs future challenges. Iranian officials, including Foreign Minister Abbas Araghchi, have lambasted the international community for failing to prevent or adequately condemn attacks on civilian nuclear facilities under IAEA safeguards. During the conflict, Ali Larijani, an advisor to Ayatollah Ali Khamenei, even threatened the IAEA chief: "Once the war is over, we will deal with Grossi."

Going forward, policymakers will have to carefully distinguish between Iran's legitimate frustrations and domestic political constraints and attempts to manipulate these conditions to mask clandestine proliferation ambitions. Indeed, the foreseeable future will be characterized by considerable speculation about both Iran's capabilities and its intentions.

Given how sophisticated Iran's nuclear program has become, and how much damage its nuclear facilities recently absorbed, restoring verification baselines will be crucial. Trump has said the United States and Iran will hold talks; these baselines should be a key focus. The international community needs to know what capabilities Iran has retained after these attacks and identify equipment and materials that could be used to reconstitute the program at a later point.

Some uncertainty is inevitable, though suspicions will run high if Iran appears uncooperative (or if policymakers and the public have to take Tehran's words at face value). Although Iraq dismantled its nuclear program after its defeat in the first Gulf War, the international community did not

trust its own success, in part because of relentless Iraqi obstruction. Over time, these incidents provided endless fodder for skeptics and pretext for indefinite interventions. Solving the nuclear question in this manner did not result in regional stability.

If all parties, including Iran, aspire to more than a temporary respite between nuclear crises, they should prioritize restoring some degree of transparency, ideally through multilateral mechanisms. Although recent events have showcased the sophistication of Israeli and U.S. intelligence penetration, public inconsistencies regarding the imminent, or not-so-imminent, threat of Iranian weaponization also underscore the perils of relying exclusively on these sources (and how leaders interpret them). Iran's grievances with the IAEA may prove insurmountable, but in the absence of cooperation, future crises will be hard to avoid and even harder to de-escalate. ■

JANE DARBY MENTON is a fellow in the Carnegie Endowment for International Peace's Nuclear Policy Program.

Meet the New Middle East, Same as the Old Middle East

By Stephen M. Walt

Given the tumultuous events of the past several years, it is tempting to herald the emergence of a "new Middle East." But how many times have we heard

that? The Six-Day War was thought by some to be a critical turning point—surely Israel's Arab opponents would make peace now?—and it didn't happen. Ditto the Egyptian-Israeli peace treaty, the first Gulf War, the Oslo Accords, the U.S. invasion of Iraq, and the Arab Spring. Yet events such as the 9/11 attacks, the Syrian civil war, the Oct. 7, 2023, assault by Hamas, the ongoing genocide in Gaza, the recurring destruction of Lebanon, the Houthis' attacks on Red Sea shipping, and the recent airstrikes on Iran keep happening.

We have seen extraordinary developments over the past decade—and especially since Oct. 7—but the underlying conditions that have made the region so conflict-ridden for so long remain unchanged. Some of the players are gone, others have gained or lost power, and several have embraced different policies, but the more fundamental sources of instability are still intact.

When I hear talk of a new Middle East, therefore, I'm inclined to be skeptical. To see why, consider first what's new and then what remains unchanged.

The most obvious and important development of the past several years is the dramatic weakening of the so-called Axis of Resistance (Iran, Hamas, Hezbollah, Iran-backed Iraqi militias, the Assad regime in Syria, and the Houthis in Yemen). Following Hamas's brutal attack on Israel on Oct. 7, Israel unleashed a massive campaign against every part of this loose coalition and with telling effect. Hamas has been gravely weakened, though it has not been eliminated and is still resisting Israel's genocidal actions. Many of Hezbollah's top leaders have been killed, and its military arm is much weaker than it was two years ago. Deprived of support, the Assad regime has been swept away, and Israel has seized this opportunity to bomb arms caches in Syria and to occupy additional territory there. It has exchanged airstrikes

with the Houthis in Yemen. Last but by no means least, in June it launched an ambitious air campaign against Iran (subsequently reinforced by the United States) in an attempt to destroy Iran's nuclear infrastructure and possibly topple the clerical regime itself. Apart from the Assad regime, none of the other parts of the Axis of Resistance have been eliminated, and all remain stubbornly defiant. But each is substantially weaker now than a few years ago.

A second development is the gradual shift in power and influence within the Arab world, away from Egypt and Iraq and toward Saudi Arabia and the wealthy Gulf petrostates. Egypt remains an economic basket case, while Saudi Arabia and the United Arab Emirates are racing to modernize and diversify their economies and to play more active diplomatic roles. Not surprisingly, some experts now believe these states can play a mediating role in the region, if only out of necessity.

Third, Russia's influence in the region has been greatly diminished by the fall of Syrian President Bashar al-Assad and the burdens of the long and costly war in Ukraine. Moscow could not prevent the regime's collapse, and it has done little to help Tehran despite the various forms of assistance that Iran has provided to Russia since it started its war in Ukraine. Russia under President Vladimir Putin is no longer able to play the spoiler role it has played in recent decades, and that development marks another significant shift.

Lastly, the role of other outside powers—including the United States—may now be changing significantly. Although the United States has been hostile to Iran for decades, the Trump administration's decision to participate actively in Israel's bombing campaign is a significant step, especially given President Donald Trump's threat to renew the attacks if Iran tries to sprint for the bomb. Israeli Prime Minister Benjamin Netanyahu and some parts of the Israel lobby in the United States



A woman walks past a billboard promoting Arab-Israeli normalization, put up by Israel's Coalition for Regional Security, in Tel Aviv on June 26.

have been pushing for this step for a long time, and they finally got their wish.

But at the same time, the brutality of Israel's assault on Gaza is undermining political support for Israel in both U.S. political parties and around the world. As former Israeli diplomat Alon Pinkas recently observed in the *New Republic*, 60 percent of Americans in a July poll disapproved of Israel's campaign in Gaza, and an April poll showed that a majority (53 percent) had an unfavorable image of that country. Leading newspapers are denouncing Israel's actions with growing frequency, and distinguished experts on genocide—including in Israel itself—are increasingly accusing the Israeli government of that heinous crime. And even if one rejects that specific term, there is no question that Israel has committed war crimes on a vast scale.

The Democratic Party in the United States is now deeply divided on this issue, and Republicans' once rock-solid edifice of pro-Israel sentiment is cracking. Similar trends are happening all over the world: A recent Pew Research Center poll of 24 countries found that majorities in 20 out of 24 had unfavorable views of Israel, and countries such as Australia, Britain, Canada, and

France have pledged to recognize a Palestinian state.

Put all this together, and one can understand why some people believe we are witnessing a potential sea change in the region. I don't doubt that some important elements have changed, but a "new Middle East"? Not so fast.

For starters, the Middle East remains an anarchic, multipolar setting, and there is no dominant or hegemonic power that can impose order there. The George W. Bush administration tried to transform the region during America's brief "unipolar moment," and it failed miserably. Netanyahu and other Israeli hard-liners may have hoped that their recent victories would establish their status as the region's hegemonic power, but a state of roughly 7.5 million Jews (along with about 2 million Israeli Arabs) that remains heavily dependent on generous U.S. backing is not going to establish durable dominance over hundreds of millions of Arab and Persian Muslims. Neither Hamas nor Hezbollah nor the Houthis nor Iran has disappeared, and all remain defiant. Those increasingly influential states in the Gulf and the Arabian Peninsula are not happy with what Israel has been doing of late, either, because they seek stability

above all else, and that is definitely not what Israel has been providing.

What this means is that the Middle East will remain a region where different states compete for power, security, and influence. Iran still wants a latent nuclear weapons capability to balance Israel, and its desire for a deterrent of its own has undoubtedly increased in the aftermath of the Israeli-U.S. bombing campaign. Egypt, Qatar, Saudi Arabia, and the UAE will continue to compete for status and influence within the Arab world; Turkey will intervene on occasion to protect its own interests; and all these states will court outside powers in an effort to bolster their positions. None of the events of the past few years seems likely to alter this recurring feature of regional politics, and institutions such as the venerable Arab League or the largely moribund Gulf Cooperation Council are far too weak to make much difference.

Furthermore, the United States is still there. Although U.S. leaders have repeatedly tried to disengage from the region—in part so that Washington can focus attention on Asia—none of them has succeeded. Trump tried to get U.S. forces out of Syria during his first term and failed, and the U.S. military footprint remains roughly what it was when he first took office back in 2017. Trump’s decision to attack Iran directly is hardly a sign of disengagement, and U.S. forces recently went after leaders of some remnant Islamic State factions in post-Assad Syria. Trump has also bombed the Houthis (to little avail), and presidential envoy Steve Witkoff keeps flying over in a thus far fruitless effort to end the carnage in Gaza. And despite growing public discontent with its actions, the U.S. government is still shoveling money and arms at Israel. *Plus ça change, plus c’est la même chose*—the more things change, the more they stay the same.

Unfortunately, this situation is a perfect recipe for resurgent Islamist extremism, and it will be a small

miracle if we don’t see new waves of terrorism emerging in response to the events of the past couple of years. That fear is one reason the Arab oil states are so alarmed by what Israel is doing; they may not have a lot of genuine sympathy for the Palestinians, but they know that their plight remains a potent recruiting tool for extremists and underscores their own failure to address the problem.

Here’s something else that hasn’t changed: We are no closer to a political resolution to the Palestinian issue and in all likelihood further away. Even allowing for the tens of thousands of Palestinians who have been killed in Gaza and the West Bank since October 2023, there are still roughly equal numbers of Palestinian Arabs and Israeli Jews living in the territories that Israel controls. Most of these Palestinians have no political rights, little agency, and no realistic prospect of getting a state of their own. Until that situation changes, some of them will continue to push back as best they can against their Israeli overlords, just as the Zionists did against the British and just as Israeli Jews would do today if the situation were reversed.

The bottom line is that the Middle East remains a region with deep political divisions, where the most powerful actors dominate others and deny them rights, agency, and recognition. One sees this in the repeated efforts to marginalize Iran through sanctions, non-recognition, exclusion from regional diplomatic efforts, and, most recently, airstrikes. One sees it in the long campaign to deny Palestinians a state of their own (or even to insist that “there is no such thing as a Palestinian nation,” as far-right Israeli Finance Minister Bezalel Smotrich has said). And one sees it within the Arab world itself, where monarchs and military dictators suppress calls for greater openness and political rights. (Remember the Arab Spring, anyone?)

Conditions such as these inevitably

generate pushback, which in turn leads to increasingly harsh acts of repression, which in turn means continued instability. Rinse and repeat. A stable regional order will require a more even balance between power and legitimacy, and legitimacy ultimately requires a measure of justice, fairness, and the provision of political rights. As long as these features remain, the “new” Middle East will be a lot like the old one. Keep this firmly in mind, and as the Who song says, you “won’t get fooled again.” ■

STEPHEN M. WALT is a professor of international relations at Harvard University and columnist at FOREIGN POLICY.

Nigeria Isn’t Caving to Trump

By Olajumoke Ayandele

As more African countries agree to accept third-country migrants deported by the United States, Nigeria is charting a sharply different course. Africa’s most populous nation has rejected Washington’s immigration policy, with Nigerian Foreign Minister Yusuf Tuggar bluntly stating in early July that the country had “enough problems” of its own and would not cave to U.S. pressure to take in deportees with no ties to Nigeria.

Nigeria’s stance is not just about immigration. It is a broader rejection of the transactional logic that has long shaped U.S.-Africa relations. Nigeria isn’t just defending its borders—it is defending its sovereignty.

This quiet but consequential standoff

comes as U.S. President Donald Trump revives his controversial policy of third-country deportations, which he introduced on a smaller scale in Latin America during his first term. Now, his administration is expanding those efforts and actively courting African nations—a shift signaled at Trump’s mini-summit with African leaders at the White House in July, where he alluded to progress on such deals without offering details.

The U.S. move reflects a broader trend in Western policy of outsourcing border enforcement through diplomatic pressure and economic incentives. The United Kingdom’s now-defunct asylum deal with Rwanda and the European Union’s recent proposal to offshore asylum-seekers both follow this pattern.

Now, the United States is following suit—dangling aid, suggesting improved trade terms, and hinting at relaxed visa restrictions in exchange for third-country deportation agreements with African states. With tariffs and aid cuts already in play, Washington’s pressure may sway some African governments. Nigeria, however, has drawn a clear line: It will not become a dumping ground for migrants.

Nigeria’s decision is grounded in both principle and pragmatism. With more than 230 million people, the country is already buckling under significant pressures, such as rising food insecurity, high youth unemployment, insurgencies in the north, and mounting economic strain. Its prisons are overcrowded, with occupancy at 137 percent. Taking in U.S. deportees would further stretch already fragile institutions and divert scarce resources from urgent domestic needs.

Moreover, the deportation proposal clashes directly with Nigeria’s foreign-policy framework anchored in the “4Ds”: democracy, development, demography, and diaspora. This strategy envisions Nigeria as a continental leader, one that shapes its international

partnerships around sovereignty and reform. A third-country deportation deal not only fails to support those goals—it actively undermines them.

This defiance is not without risk. In an international system where many sovereign states have compromised values for aid or short-term advantage, Nigeria’s rejection could strain bilateral relations with the United States and jeopardize future cooperation. The timing is especially sensitive. Nigeria’s recent entry into BRICS as a partner country puts it in direct conflict with U.S. tariff threats to target member states—an escalation that could further destabilize trade and diplomatic ties amid economic uncertainty.

Nonetheless, Nigeria’s firm refusal is part of a wider reckoning across the global south. For too long, African states have been expected to absorb the downstream burdens of Western crisis management and implement decisions made in faraway capitals, often in return for donor assistance. In the 1980s and ’90s, for instance, structural adjustment programs imposed by Western financial institutions gutted African economies in the name of reform. After 9/11, the continent was once again instrumentalized—repurposed as a frontier for counterterrorism and migration control, with African

states pressed to host foreign military bases, detain migrants, and police borders on behalf of wealthier nations.

But those dynamics are shifting. A growing number of countries in Africa are no longer willing to act as subcontractors for Western policy. South Africa, for instance, has largely resisted U.S. pressure over its trade and foreign-policy alignments, maintaining its ties with Russia and Iran, even amid trade negotiations with the United States.

Today, Nigeria is drawing a new line in the sand. Its vision of sovereignty is not just about territorial control. It is about policy autonomy, diplomatic dignity, and reciprocal partnerships. Saying no is no longer just subversive. It is strategic.

Nigeria’s position also exposes a blind spot in U.S. foreign policy. Nigeria is a regional heavyweight: In 2024, its bilateral trade with the United States neared \$10 billion, making it one of Washington’s top African partners. Nigeria plays a pivotal role in regional peacekeeping, counterterrorism, and global energy supply. It also wields influence within the African Union and the United Nations, where it consistently champions reform in global governance. Yet Washington risks underestimating the cost—



Detained Venezuelans originally deported by the United States board a flight to Venezuela at an airport in La Paz, El Salvador, on July 18. El Salvador is among the third-party countries accepting U.S. deportees.

economically, diplomatically, and strategically—of alienating such a critical partner, especially as global competitors rush to fill the void.

To be sure, the United States is not unaware of Nigeria’s importance. In April, Trump’s Africa advisor, Massad Boulos, met with Nigerian President Bola Ahmed Tinubu in Paris to discuss enhanced cooperation on trade, security, and peacebuilding. But such efforts are undermined when diplomacy is reduced to dealmaking that serves domestic optics at the expense of mutual respect.

As Nigeria asserts its independence, other powers are watching. China, Qatar, Russia, Saudi Arabia, Turkey, and the United Arab Emirates are all expanding their footprint across Africa through infrastructure, investment, and diplomacy that eschew the conditionality, moralizing, and top-down reform demands associated with Western paternalism. These alternatives come with risks—particularly around debt and governance—but they resonate because they treat African countries as equals, not instruments.

By contrast, Trump-era foreign policy remains locked in a zero-sum, transactional model. When incentives are laced with coercion and expectations of compliance, trust evaporates. Nigeria’s refusal to comply may well reverberate across the continent, especially among states already reassessing their strategic alignments. Whether this will spark a coordinated African stance remains uncertain. But amid growing frustration over extractive trade terms, multilateral double standards, and the externalization of migration policy, the political conditions for a shift are emerging.

For the United States, Nigeria’s defiance should be a wake-up call. If Washington wants resilient partnerships in Africa, it must move beyond conditionality and toward genuine collaboration. The rules of global cooperation are changing, and the era in which power

alone could secure compliance is waning. Partnership—not pressure—is the new currency of diplomacy. ■

OLAJUMOKE AYANDELE is a clinical assistant professor of practice at New York University’s Center for Global Affairs and a Public Voices fellow.

AFRICA BRIEF: *Nosmot Gbadamosi rounds up essential news and analysis from Algeria to Zimbabwe and countries in between. Sign up for email newsletters at ForeignPolicy.com/briefings.*



China May Be Changing Its Nuclear Strategy

By Tong Zhao

During his visit to Moscow in May, Chinese President Xi Jinping released a joint statement with Russian President Vladimir Putin that emphasized nuclear weapon states’ special responsibility to “reject Cold War mentality” and “refrain from actions that generate strategic risks.”

For decades, China maintained a relatively relaxed posture compared with the United States and the Soviet Union. It kept nuclear weapons on low alert in peacetime and remains the only country to pledge never to use them first under any conditions.

Yet certain behaviors suggest that China may be preparing to adopt one of the Cold War’s most dangerous nuclear practices—launch under attack (LUA)—as part of its substantial expansion of its capabilities.

LUA is a policy that allows the political leadership to authorize rapid nuclear counterstrikes based on early warning data. If a state detects an incoming nuclear strike, its leadership can launch immediate nuclear retaliation before enemy nuclear warheads explode over its territory.

Thus far, only the United States and Russia have adopted LUA. Yet while some Chinese diplomats have publicly called on all nuclear states to reject LUA, China appears to be quietly building the necessary infrastructure to adopt LUA itself—without offering any public clarification on related capabilities or policy.

Notably, it is building a comprehensive early warning system, including infrared satellites and large ground-based radars, to detect potential attacks.

Chinese military writings also increasingly endorse the LUA concept, termed “early warning counterattack,” presenting detailed discussions of LUA design and execution while asserting the policy’s compatibility with China’s no-first-use policy.

Though an LUA policy has some perceived deterrence benefits, it also introduces serious new dangers.

LUA has always been risky, but it would be even riskier and more complicated for China today than it was for its counterparts during the Cold War.

Whereas U.S. and Soviet leaders only had to track ballistic missiles that follow predictable trajectories, China will



Chinese People's Liberation Army soldiers take in the view of a Chinese-made Dongfeng 1 missile from a balcony at the Military Museum in Beijing on Dec. 6, 2004.

have to contend with advanced missiles with maneuverable flight paths. Plus, it may be difficult, if not impossible, to distinguish certain conventional and nuclear missiles from one another, further complicating decision-making about retaliation.

China's geographic proximity to other potential U.S. targets adds another layer of uncertainty. China, North Korea, and Russia are all believed to maintain certain nuclear or strategic missile facilities near the Chinese border. In a crisis, China's early warning system may not be able to reliably discern whether U.S. missiles heading toward Northeast Asia are targeting North Korea, Russia, or China itself, not least because of possible last-minute trajectory changes.

Chinese leaders would face the formidable task of assessing threats, evaluating intent, weighing options and consequences, and deciding within minutes whether and how to retaliate. Achieving absolute certainty that an attack warning is not the result of a technical glitch, human error, or adversary cyber interference is an equally daunting challenge.

Traditionally, China has stored warheads separately from delivery systems, which delays nuclear retaliation for hours, if not days, after an attack.

LUA would require mating nuclear warheads to at least some delivery systems, which increases the risks of nuclear safety and security incidents.

The United States and Russia have spent decades grappling with false alarms and near-miss incidents that created some of the Cold War's most dangerous moments. Under LUA, China could expose itself—and the international community—to similarly grave risks, despite urging avoidance of a new Cold War.

LUA adoption also challenges the Chinese political leadership's absolute control over nuclear decision-making. Because of compressed decision timelines, the army will likely shoulder greater responsibility for planning retaliation options, giving it an unprecedented degree of nuclear decision-making power.

Though it carries obvious risks, adopting LUA could offer China some marginal security benefits.

It could strengthen deterrence against an out-of-the-blue, large-scale nuclear attack in peacetime or a drastic escalation involving a massive disarming strike during a conventional or limited nuclear conflict, likely around the Taiwan Strait.

However, in more plausible scenarios involving gradual, less clear-cut

escalation—marked by cycles of tit-for-tat nuclear exchanges—there would be no obvious indicator for when China would or should initiate an LUA response. Without such clarity, a U.S. nuclear strike that appeared “proportionate” to U.S. decision-makers could inadvertently cross China's LUA threshold, potentially triggering full-scale nuclear war.

China's political leadership may not have yet evaluated the full consequences of LUA. But given the limited military benefits and serious security risks, Beijing should not move forward with it.

The early warning systems still in development will remain valuable to support other Chinese programs, including missile defense, even if they are not used specifically for LUA. As China's nuclear arsenal grows, it also has less need for an aggressive launch policy anyway.

In fact, by simply maintaining the appearance of an LUA posture, China could create enough uncertainty to deter the United States without actually making plans to launch under attack. Indeed, during the Cold War, U.S. strategists recognized that, for deterrence, adversaries' belief that the United States would launch under attack was more important than Washington's actual willingness to do so.

If the decision to adopt LUA is already made, China should at least implement safeguards to mitigate the most destabilizing risks.

For instance, it could choose to launch only after confirming a nuclear detonation on its soil but before the bulk of U.S. warheads had landed, rather than on mere detection of a launch. Additionally, it could require that any missile attack warning be verified through at least two independent types of sensors to reduce the risk of false alarms. China may already be moving in this direction by developing both satellite-based infrared detectors and ground-based radars. However, to consistently uphold these standards against evolving technologies demands clear, firm, high-level directives.

The most destabilizing scenario would be if China's pursuit of LUA signaled a broader shift in its nuclear doctrine toward targeting enemy nuclear forces and limiting damage in a nuclear war. Traditionally, China's nuclear strategy has not prioritized strikes against an adversary's nuclear forces or command-and-control centers. But under LUA, such targets could become more relevant, potentially steering China toward a greater embrace of nuclear warfighting.

While there is little evidence of China pursuing such a radical shift in strategy, U.S. strategists worry about China's growing arsenal and ability to target U.S. nuclear forces. Just as the United States adopted LUA in response to perceived Soviet hard-kill capabilities, similar concerns about China could push the United States toward greater reliance on LUA in the future—a shift that could undermine Chinese security in the long run.

One potential silver lining is that exploring LUA may give Beijing greater empathy for the United States and its concerns over certain Chinese military capabilities and behaviors. This, in turn, could open new avenues for unilateral or cooperative risk-reduction measures.

For instance, LUA requires robust nuclear command, control, and communication systems, including operational early warning sensors. Both the United States and China would likely appreciate establishing a mutual understanding about not targeting these critical assets.

Beijing may also come to better understand the genuine difficulty Washington faces in assessing the nature of an incoming Chinese missile strike—particularly when the missiles are maneuverable and their payloads are ambiguous. Recognizing that any U.S. misjudgment or overreaction in such a scenario could have dire consequences for China might encourage Beijing to reflect on its own capabilities reportedly in development, including conventionally armed intercontinental ballistic missiles and long-range missiles that can carry either nuclear or conventional warheads.

Washington also harbors significant concerns about Beijing's reported development of an orbital bombardment system—a nuclear weapon system that can be launched into outer space and then, with minimal warning time, descend and strike targets, including enemy leadership or critical nuclear command-and-control facilities. U.S. fears about such an “early warning-busting” weapon may now resonate more strongly with Chinese security experts, who have so far declined to seriously evaluate these concerns.

As China explores LUA, the United States should reflect on elements of its own nuclear strategy that potentially drive China to consider such a posture, including the viability and long-term risks of its damage limitation strategy.

For their part, Chinese decision-makers should conduct full reviews of LUA's security implications, including how it might erode the political leadership's control over nuclear strategy. Subsequent debates about LUA should be broad and open, rather than left to a small, secretive circle of military

planners. Beijing should also recognize that even seemingly operational-level decisions may have broad, strategic-level consequences. Its choices regarding the depth of cooperation with Russia on early warning systems—and whether to share early warning data—could influence U.S. perceptions of Sino-Russian nuclear integration, potentially reshaping the nuclear triangular relationship.

Ultimately, China stands at a crossroads, and its choice could influence nuclear dangers for decades to come. Beijing can choose to emulate the most destabilizing aspects of Cold War nuclear strategies, or it can forge a path of deliberate control and strategic restraint. History will judge China not only by what it builds but by what it has the wisdom to forgo. ■

TONG ZHAO is a senior fellow at the Carnegie Endowment for International Peace, in both the Nuclear Policy Program and Carnegie China.

Leashing Chinese AI Needs Smart Chip Controls

By Kyle Chan and Ray Wang

China's stunning achievements in artificial intelligence have one glaring weak spot: access to compute—the raw processing power that fuels AI and relies on large volumes of advanced semiconductors. The United States currently has a tenfold advantage over China in total compute capacity, a gap that may only widen over time. U.S. tech firms

are pouring billions of dollars into new data centers and can reap the benefits of the latest chip advancements from Nvidia and AMD or their own self-developed AI chips.

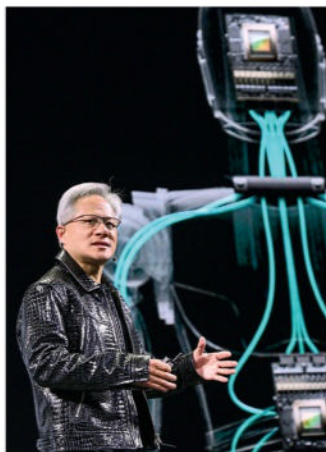
Meanwhile, the performance and volume of foreign AI chips that Chinese firms can obtain have gone down due to increasingly stringent U.S. export controls. Chinese tech leaders such as Tencent, Baidu, and DeepSeek have called out compute constraints as a key bottleneck to faster AI development.

Huawei's domestically produced AI chips, known as the Ascend series, might seem like the obvious solution to China's compute challenges. But there's a catch: Chinese tech firms don't want to use Huawei's chips, which lag behind their foreign counterparts, for training their AI models. In 2024, Chinese companies bought around 1 million Nvidia H20 chips compared with an estimated shipment of 450,000 Huawei Ascend 910B chips.

Only a handful of state-backed companies in China have used Huawei chips to train their models, including iFlytek, SenseTime, and China Mobile. Chinese companies are dragging their feet on switching to domestic AI chips despite pressure from Chinese government agencies to do so.

Chinese AI developers overwhelmingly prefer using Nvidia chips—even severely performance-degraded ones—and go to great lengths to access them. Many of China's top AI models today are still trained on Nvidia's hardware, including DeepSeek's V3 model and Moonshot's Kimi K2 model. In anticipation of a U.S. ban on Nvidia's H20 chips, ByteDance, Alibaba, and Tencent rushed to spend \$16 billion to stockpile roughly 1.3 million to 1.6 million H20 units in the first three months of 2025.

At the end of last year, ByteDance had planned to spend \$7 billion to access Nvidia chips on servers outside China. Chinese tech companies have been scouring black markets across Asia as well as e-commerce sites to acquire



Nvidia CEO Jensen Huang speaks at the CES trade show in Las Vegas on Jan. 6.

banned Nvidia chips for as much as double their normal price. Chinese buyers have even resorted to buying Nvidia's RTX gaming chips as substitutes, even though they are not designed for AI workloads, and smuggling hard drives full of data out of the country to train models on servers outside China.

Why are China's AI developers so reluctant to switch from Nvidia to Huawei, even as their access to Nvidia chips becomes increasingly constrained?

First, Nvidia's degraded chips for sale to China still outperform Huawei's chips in some important dimensions. Huawei's Ascend 910B chips use older HBM2E memory technology, offering only two-thirds of the memory capacity and 40 percent of the bandwidth of Nvidia's H20 chips.

Huawei's newer Ascend 910C chips, which are ramping up production this year, offer 80 percent of the H20's bandwidth but still use the older HBM2E memory standard that is two generations behind the most advanced AI chips. This gap in memory performance is particularly important given the rise of reasoning models and inference, where memory bandwidth plays a vital role. DeepSeek's new model was reportedly hampered by a government directive to use Huawei chips.

A second key reason why Chinese tech companies can't easily quit Nvidia is the same reason U.S. tech companies can't either: CUDA. Nvidia's parallel computing platform, launched in 2006, has accumulated users and is tightly integrated with PyTorch, the dominant AI framework, creating a mature software ecosystem that locks developers into Nvidia's AI systems.

For Chinese tech firms, switching away from Nvidia means rewriting code, abandoning this industry-leading infrastructure, and losing access to the applications in CUDA libraries built up over years by global developers. Huawei's alternatives—its CANN platform and MindSpore framework, launched in 2018 and 2019—are newer, less mature, and plagued by technical issues including bugs, crashes, and overheating.

With a far smaller AI hardware user base than Nvidia's systems, Huawei lacks the high-volume, real-world feedback from major customers needed to rapidly refine its chips and software. As a result, Huawei's AI solutions are unable to take advantage of the kind of iterative optimization that made China a global leader in other industries.

U.S.-led export controls on semiconductor manufacturing equipment to China have limited the country's chip-making capabilities, leaving Huawei and Semiconductor Manufacturing International Corp. (SMIC) struggling to ramp up production of advanced chips at the 7-nanometer process level or below. A lack of access to extreme ultraviolet lithography machines from ASML and U.S. tools for key tasks such as etching and deposition have made it difficult for SMIC to manufacture advanced chips precisely and reliably, keeping its production yield far below industry leader Taiwan Semiconductor Manufacturing Co. (TSMC).

Chinese companies are also wary of the additional commercial and geopolitical risks involved with Huawei. For example, the U.S. Commerce Department

warned in May that using Huawei chips “anywhere in the world” would violate U.S. export control rules, before later adjusting its announcement.

Huawei is not only a chip supplier to Chinese tech companies but also a powerful competitor. Huawei is China’s second-largest cloud service provider and has developed its own open-source Pangu family of AI models. Other Chinese tech companies are jostling with Huawei to provide cloud services not just within China but globally as well—making Huawei’s chips an unpopular option for firms competing in the same space.

However, this could all change if the United States makes the wrong decisions.

While Huawei’s chips have lower bandwidth memory performance than Nvidia’s H20 chips, Huawei’s 910B and 910C chips already offer greater total processing performance and better energy efficiency than the H20. Far from being a “powerful chip” as some have claimed, the H20 actually has worse computational performance and energy efficiency than Nvidia’s older A100 chips, launched back in 2020. Moreover, Huawei has been able to improve the computational performance of its Ascend chips, even after switching production from Taiwanese chip manufacturer TSMC to China’s own SMIC following U.S. export controls.

Perhaps more importantly, Huawei has been making significant progress at the level of AI computing systems. Huawei recently unveiled its CloudMatrix 384 system, made up of 384 of Huawei’s latest 910C chips and a novel all-optical networking approach. According to the consultancy SemiAnalysis, Huawei’s new CloudMatrix system outperforms Nvidia’s state-of-the-art GB200 NVL72 system on key dimensions, such as compute power (how fast the chip can process large volumes of data), memory bandwidth, and integrated networking.

U.S. export control policies must be

carefully calibrated to avoid pushing China’s AI industry too far. If China’s domestic AI chips continue to improve, while U.S. chips available in China are further downgraded by export controls, there will be a crossover point where the performance of Chinese chips clearly exceeds that of U.S. chips available in China.

The crucial tipping point could be if China’s largest tech companies, such as Alibaba, Tencent, and ByteDance, throw their formidable resources toward working with Chinese AI chipmakers. This would kick off a positive feedback loop for China’s AI chipmakers, particularly Huawei, building up the software libraries and tools for creating a complete Chinese AI hardware-software ecosystem.

There are already some signs of this potential shift. DeepSeek and ByteDance are experimenting with using Huawei’s AI chips to run their AI models—although DeepSeek, as noted earlier, has already found this problematic. Ant Group, a spinoff of Alibaba, is even testing the use of Huawei’s chips for model training. Huawei’s Ascend developer community has grown nearly tenfold in the past four years, though it still remains far smaller than Nvidia’s.

Other Chinese AI chipmakers besides Huawei are making progress as well, including Cambricon, Biren, Moore Threads, Enflame, and Hygon. Cambricon saw its first-quarter revenue surge more than fortyfold last year and received a large order for its AI chips from ByteDance. Cambricon’s revenue is forecasted to grow to 5.5 billion yuan (about \$760 million) this year, according to Goldman Sachs. Nvidia CEO Jensen Huang has said the company’s market share in China has declined from 95 percent to 50 percent—a claim supported by other credible analysis.

Semiconductor export controls are not as simple as tightening the valve on a tap. China’s AI chip dilemma is not just a hardware problem but an

ecosystem one. Huawei now has access to many of the key resources it needs to develop advanced AI chips, including financing and talent. But it’s missing a large and dedicated customer base that is committed to co-refining the software and hardware Huawei offers.

A smart approach to export controls would focus on setting a performance threshold for AI chips that can be sold to China, one high enough to outperform China’s domestic hardware options to ensure Chinese developers remain on U.S. platforms. At the same time, it should be low enough to maintain a significant performance gap.

Ideally, this performance threshold would include a buffer, such as a 50 percent performance advantage over Chinese hardware systems on key metrics, in anticipation of improvements in Chinese hardware offerings. A regular yearly update, with ad hoc changes for unexpected developments, would likely be sufficient to adjust for advances made in Chinese AI chips while providing enough policy stability for industry participants.

The overarching policy goal is clear: to ensure the United States continues to lead the world in AI. By constraining China’s access to cutting-edge chips without pushing Chinese AI developers to make the leap to China’s own domestic chips, Washington can use export controls to help make this a reality. ■

KYLE CHAN is a postdoctoral researcher in Princeton University’s sociology department, and **RAY WANG** is the research director of semiconductors, supply chain, and emerging technology at the Futurum Group.

CHINA BRIEF: *FP’s James Palmer explains the political drivers behind the headlines in Beijing and shows you the stories the West has missed. Sign up for email newsletters at ForeignPolicy.com/briefings.*

ASIA & THE PACIFIC



Trump Is Pushing India to Submit to China

By Sushant Singh

By any historical measure, India is reluctant to bow to coercion. Jawaharlal Nehru, the country's first prime minister, championed the cause of nonalignment, and his successors have sworn by variants of strategic autonomy. Yet recently India has swallowed more provocations and offered more concessions to China than at any point since the two countries' 1962 border war.

This year, National Security Advisor Ajit Doval, Defense Minister Rajnath Singh, Foreign Secretary Vikram Misri, and External Affairs Minister S. Jaishankar have all visited China. Each trip culminated in a pledge to normalize relations, even amid Chinese provocations. Indian Prime Minister Narendra Modi completed his own trip to China in September for the Shanghai Cooperation Organisation summit.

The trigger for this shift—Indian officials accepting Chinese terms—is not a sudden loss of national nerve. It is the return of U.S. President Donald Trump, whose “America First” diplomacy has

stripped India of strategic cover. In the months since Trump took office, China reportedly provided Pakistan with military intelligence, withdrew engineers from factories in India, continued to restrict access on the disputed border in Ladakh, and officially renamed sites in the Indian state of Arunachal Pradesh.

Meanwhile, India has maintained its silence and avoided confrontation to preserve normalization talks. On the new Indo-Pacific chessboard, New Delhi's calculation is evident: Accommodating Beijing now costs less than betting on Washington's assured support. This shift represents a fundamental realignment in geopolitics, as India's strategic autonomy gives way to pragmatic submission to China.

There was ample evidence of New Delhi's capitulation to Beijing during the India-Pakistan conflict in May, when China reportedly provided Pakistan with live satellite intelligence on Indian deployments, even as cease-fire talks were ongoing. India's deputy army chief has said China treated the conflict as a “live lab” for its weapons systems, with 81 percent of Pakistani military hardware procured in the last five years sourced from China.

Yet India publicly condemned Pakistan without mentioning China's role. This suggests that Modi is acutely aware that an escalation with Beijing without assured U.S. backing risks political embarrassment.

China now presents a more direct military challenge to India, too. In the past, Jaishankar argued that India's bilateral ties with China could only be “normal” if the situation on their disputed border in eastern Ladakh were normal. Despite an understanding reached along the border last October, Indian soldiers are still unable to access “temporary and limited” buffer zones set up after a deadly clash in Galwan in 2020. There has been no reduction in additional soldiers on the border by either side, and China refuses to acknowledge the need for further de-escalation.

However, in July, during Jaishankar's first visit to Beijing since the clash, he avoided using the phrase “return to status quo ante on the border,” as was India's aim in 2020—instead praising a “positive trajectory” in bilateral ties. The Modi government seems to have accepted this new normal as a *fait accompli*.

In early July, *Bloomberg* reported that Taiwanese multinational Foxconn had recalled more than 300 Chinese engineers from its iPhone manufacturing plants in southern India—stalling Apple's strategic initiative to diversify its supply chain. India dismissed the news as an issue between Apple and Foxconn, ignoring reports of likely Chinese state pressure to remind multinationals that their supply chains still answer to Beijing.

The Foxconn move followed China's tightening of customs clearances on rare-earth magnets, tunnel-boring machines, and specialty fertilizers—items critical to India's push on electric vehicles, the bullet train corridor between the cities of Mumbai and Ahmedabad, and food security, respectively. Rather than threatening coercive action, India has restricted itself to “monitoring the situation” while importers scramble for other options.

India's willingness to absorb these economic shocks rather than risk outright confrontation with China illustrates a new realism: Beijing's economic leverage has become too costly to challenge openly.

Finally, to further assert its territorial claims, China's Civil Affairs Ministry in May released its fifth batch of renamed sites inside Arunachal Pradesh, which China calls South Tibet. India rejected the nomenclature but slapped no costs on China. Then, Beijing officially warned New Delhi not to interfere in its internal affairs as the Dalai Lama celebrated his 90th birthday in Dharamsala, India, in July—referring to the question of the Tibetan spiritual leader's succession.



Indian Prime Minister Narendra Modi shakes hands with Chinese Premier Li Qiang during the BRICS summit in Rio de Janeiro on July 7.

China's Ministry of Foreign Affairs formally admonished Modi, while the Chinese Embassy in New Delhi warned Indian commentators against using the issue of Tibet—including public support for the Dalai Lama or advocacy for Tibetan autonomy—as political leverage in bilateral relations. India responded with silence.

Taken together, these episodes illustrate an unmistakable pattern. China tests, pushes, and even embarrasses India, while Indian officials press on for normalization. The Modi government once intended to reduce reliance on Beijing but is now giving way to a pragmatic acceptance of Chinese dominance in key areas of trade and security.

The ground has shifted, in large part because Trump has upended the cost-benefit analysis that once guided Modi's strategy: maximize strategic autonomy, hedge between the United States and other friends, and lean on Washington when core interests come under pressure from Beijing. Trump's America First doctrine deprioritizes regional strategic partnerships, making exceptions when they advantage the United States in the short term.

Under Trump, Washington has grown less deferential to New Delhi's interests. Faced with these signals, Indian policymakers have concluded

that the United States will not underwrite any high-stakes confrontation between India and China.

Trump's second term has shredded India's safety net with respect to China in a few ways. On the trade front, Trump has imposed a 50 percent tariff rate on India, including secondary tariffs for purchasing Russian oil and weapons. Indian and U.S. negotiators have met multiple times without clinching an exemption or a so-called mini-deal. Suddenly China, not the United States, looks like the easier economic partner. India's overall trade with both countries is at similar levels, but it has a trade surplus with the United States and a large trade deficit with China.

In June, Trump hosted Pakistan Army chief Asim Munir at the White House and then boasted that he had "stopped a nuclear war" in South Asia and stood ready to mediate over Kashmir. The U.S. president has snubbed Modi by repeatedly claiming to broker peace between India and Pakistan. India has interpreted Trump drawing equivalence between Munir and Modi and bringing Kashmir to the discussion table as a pivot away from privileging Indian interests in the region.

Furthermore, the U.S. Defense Department has asked both Australia and Japan for explicit plans on what

they would do in the event of a war over Taiwan, a request that "caught Tokyo and Canberra by surprise," according to a source in the *Financial Times*, and underscored Washington's new pay-to-play posture. India likely worries that it could hear a similar demand from the Trump administration, using tariffs as leverage.

The United States could also push India to increase its defense spending, something that Trump has already demanded from NATO allies. Urging New Delhi to increase defense spending would signal that Washington expects partners to shoulder a larger share of the regional security burden.

Meanwhile, the Quadrilateral Security Dialogue—comprising Australia, India, Japan, and the United States—is sliding from strategic ballast to a diplomatic afterthought, with less emphasis on coordinated deterrence and more on bilateral dealmaking by individual countries, including with China. The Quad is flexible and lacks a formal treaty structure; Trump favors clear and quantifiable commitments that he can leverage for reciprocal gains.

Foisted on India within a few months, these shocks have recast the United States from an indispensable partner to an unpredictable acquaintance. That would be troubling for India in ordinary times; facing a truculent China, it is destabilizing.

India is accommodating China not because it underestimates the risks of such a posture but because it calculates that the cost of resistance without U.S. support is simply too high. This approach is as much capitulation born of military and technological weakness after 11 years of Modi's rule as it is realpolitik under duress. India hopes to manage Chinese coercion just short of humiliation while waiting out a U.S. election cycle that might restore equilibrium.

From India's perspective, strategic autonomy now means choosing which dependency hurts less. Navigating

between the two superpowers while preserving sovereign space depended on both China and the United States seeing value in restraint. A lopsided relationship with China at least comes with predictable red lines. India must respect China's core interests—Tibet, Taiwan, and disputes in the South China Sea—and the two sides can pretend as if bilateral ties are normal. With China, accommodation earns stability.

The United States under Trump offers no comparable certainty; deference earns nothing, while defiance invites penalty. India is not conceding because it trusts China. It is conceding because it no longer trusts the United States to assume part of the burden of resistance in the Indo-Pacific. In his second term, Trump has achieved for China what years of salami-slicing along its disputed border with India in the Himalayas could not: He has made pragmatic submission appear cheaper than strategic defiance.

The bill will come due, not just for India but for every country that once counted on U.S. power to balance Chinese ambition. Unless the United States relearns the art of reassurance, India's reluctant capitulation will be remembered as the canary in the coal mine. ■

SUSHANT SINGH is a lecturer at Yale University and consulting editor with the *Caravan* magazine.

Bangladesh's Democratic Aspirations Remain Just That

By Salil Tripathi

On Aug. 5, 2024, Bangladeshi Prime Minister Sheikh Hasina, facing massive protests against her government, fled the capital of Dhaka for India, where she remains in exile. She faces serious charges in Bangladesh, including crimes against humanity, corruption, and contempt of court. The country's interim government has sought her extradition; India, which considered Hasina an ally, has not responded to Bangladesh's request.

Students and activists marched in the streets throughout the summer of 2024—initially opposing the reinstatement of quotas for government jobs for the descendants of Bangladeshi freedom fighters, which were effectively state patronage for children of supporters of Hasina's party, the Awami League. In a country with high youth unemployment, students resented that.

But Hasina failed to read the mood of the nation. She ridiculed the protesters, calling them *razakars*, a pejorative term for those who collaborated with Pakistani troops during Bangladesh's independence war in 1971. The protests against Hasina grew, and the police and paramilitary used disproportionate force against demonstrators; hundreds of people died, and there were massive human rights violations.

The political transition in Hasina's wake has been chaotic. Nobel laureate Muhammad Yunus, an 85-year-old economist known for pioneering micro-credit (and also condemned by Hasina), took over as the chief advisor of the interim government. He assembled a governing coalition of civil society activists, technocrats, administrators, and politicians. People had real hope for political change.

For decades, political power in Bangladesh has oscillated between two dynasties: that of Hasina, whose Awami League led the country from 1996 to 2001 and again from 2009 until last year, and her father, independence leader Sheikh

Mujibur Rahman, who governed from 1972 to 1975, when he was assassinated as president; and that of the Bangladesh Nationalist Party (BNP), whose leader Khaleda Zia was prime minister from 1991 to 1996 and again from 2001 to 2006. (Before that, Zia's husband, Ziaur Rahman, was president from 1977 to 1981, when he too was assassinated.)

Bangladeshis have long yearned for a so-called minus-two solution: a government without either the Awami League or the BNP at the helm.

Since Yunus took office a year ago, the mood in Bangladesh has soured. Human rights abuses continue, and some of his political opponents are in jail. Fundamentalist Islamism has resurfaced as a threat to liberal democracy and women's rights, economic growth has faltered, and U.S. tariffs threaten the country's garment exports. The interim government has delayed elections, which may now take place between February and April 2026. With the Awami League banned, it will likely be a lopsided contest.

To be sure, Bangladesh has suffered years of misrule. Hasina had a long stint as prime minister, but only her 2009 electoral victory was free and fair. Widespread allegations of vote rigging plagued the government in the three elections that followed, two of which were boycotted by the principal opposition parties. Corruption hollowed out institutions, and unemployment rose.

Bangladesh's politics are exceptionally divisive. The country is dominated by two parties that detest each other and are unable to function in a bipartisan manner. After a decade and a half of Awami League rule, many opposition politicians want revenge, and Bangladeshi prosecutors filed charges against Hasina over last summer's violence in a special tribunal. Hasina has no plans to return to the country; the trial is proceeding in absentia.

When Hasina was ousted, there was a palpable sigh of relief in Bangladesh. Human rights defenders thought that

they would be able to operate more freely, that an inquiry commission would find answers about people detained for years without trial, and that the families of many people who had been disappeared would get some closure. Yunus had support from civil society, and it seemed that the rule of law would prevail and Bangladesh's unrestrained paramilitary forces would be held accountable.

Though some people expressed fear that fundamentalist Islamists would attack religious minorities in Hasina's absence, there was also hope that Yunus would deal with fundamentalism firmly. Many people also expected the interim government to crack down on corruption and try to bring back some of the wealth siphoned away from banks by influential politicians and businesspeople.

But the aspiration that the democratic clock would reset remains just that. Though undoing the mess of 15 years of Hasina's rule will take time, the Yunus administration has proceeded at a lethargic pace. Democratic reforms have been slow, and activists fear that religious fundamentalists will impose their will to roll back women's rights if the once outlawed Islamist party Jamaat-e-Islami significantly increases its seats in the parliament.

Women's empowerment has been an achievement of successive Bangladeshi governments, and the country abounds with organizations that have championed women's rights. Female literacy is on the rise, and women's labor force participation rate has increased compared with neighboring India. But those gains are at risk as fundamentalist parties such as Jamaat-e-Islami and organizations such as Hefazat-e-Islam flex their muscles.

Jamaat-e-Islami has never won more than 13 percent of the popular vote in Bangladesh, but it is becoming more popular, holding large public rallies. Meanwhile, members of Hefazat-e-Islam have marched in the streets calling

People celebrate the one-year anniversary of student-led protests that helped oust former Bangladeshi Prime Minister Sheikh Hasina, in Dhaka, Bangladesh, on Aug. 5.



for Islamic laws and protesting state recommendations to give equal inheritance rights to women. These groups insist on gender norms that are at odds with Bangladeshi society.

Such challenges are best addressed head-on by leaders with a political mandate. The officials in the interim government may mean well, but they lack legitimacy. Yunus's main task was to steer the country toward elections, but because progress has been sluggish, anti-democratic forces are regrouping.

In the prevailing inertia, the BNP and the fundamentalist movements have begun to assert themselves. The BNP has allied with Jamaat-e-Islami in the past. Should the Awami League not be able to field candidates, it is unclear whether that alliance will hold. The National Citizen Party, formed by the student activists who rose against Hasina, might also be a force to reckon with. Elections are too far away to know for sure.

In the meantime, score-settling is taking over. Several intellectuals, lawyers, and activists—many of whom are Awami League supporters—are now in jail. Most of these people have been arrested on murder or attempted murder charges over cases of political violence, based on scant evidence. Though the civil society leaders who have spoken out for human rights in the past but stayed silent during the government's

crackdown last year need to be held accountable, jailing them under repressive laws undermines the interim government's claim to turn over a new leaf. The government seems powerless to stop the witch hunt and has contributed to it.

It is widely accepted that law enforcement authorities killed at least 800 people during last year's protests, and it is quite possible that some officials affiliated with the Awami League were involved. But there is little credible evidence to suggest that all the individuals now in jail are implicated. Their only crime seems to be that they supported Hasina's party. Such arbitrary arrests were the hallmark of Awami League rule; they are now appearing in another form.

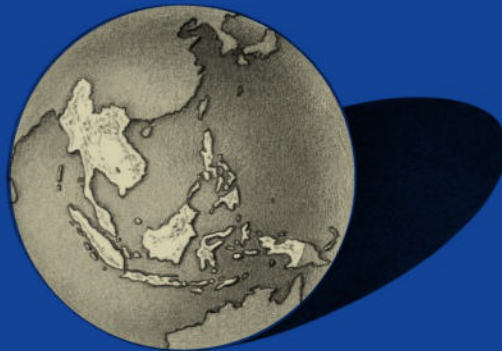
The regression in human rights in Bangladesh is one of the cruelest ironies of the post-Hasina era. During her rule, the infamous Rapid Action Battalion and other security agencies were responsible for hundreds of enforced disappearances, extrajudicial killings, and arbitrary detentions. The new government pledged to reform these institutions and hold perpetrators accountable.

The tragedy of Bangladesh's current situation is that the political divide is Manichaean. People are sympathetic only to their own cause. Awami League supporters are appalled that statues of

FP

Introducing...

Southeast Asia Brief



A weekly dispatch from Jakarta
with news from the region's 11 countries.

INDONESIA | PHILIPPINES | VIETNAM | THAILAND | MYANMAR
MALAYSIA | CAMBODIA | LAOS | SINGAPORE | TIMOR-LESTE | BRUNEI



Written by Joseph Rachman

SIGN UP FOR THE NEWSLETTER AT
[FOREIGNPOLICY.COM/SEABRIEF](https://foreignpolicy.com/seabrief)

Mujib, Hasina's father, have been toppled and his home burned but have little to say about the hundreds of people who were killed last year. Awami League opponents only speak of those deaths and are unwilling to acknowledge the grievous harm done to Bangladesh's history in seeking to erase Mujib or his legacy.

Bangladesh needs to move beyond its retributive cycle; yesterday's victims must not become today's perpetrators. Justice, not revenge, should be the guiding principle.

Nothing would please Yunus more than to shift the focus to less contentious issues, such as economics. Encouraged by the stability he speaks about, multilateral lending agencies have resumed loans to Bangladesh. Inflation has fallen in the past year from nearly 12 percent to below 9 percent. But U.S. President Donald Trump's 20 percent tariffs on the country, which went into effect in August, will hurt Bangladesh's garment exports, about a fifth of which go to the United States.

Worsening ties with India also present a problem for trade. During Hasina's rule, Bangladesh enjoyed a warm relationship with India. The longtime leader's fall presented a quandary for New Delhi, which quickly raised concerns with Dhaka about threats to Bangladesh's Hindu minority. Some revenge-seeking groups attacked Hindu property in the days after Hasina fled, and the attacks had as much to do with religion as the perception that Hindus had largely backed the Awami League. Regardless, that is no justification for persecuting a minority. The moderates who hoped to foster a pluralistic and secular Bangladesh now find themselves on the defensive. Yunus has reached out to China and Pakistan for friendship, which neither India nor the United States will view kindly.

The toughest task for Yunus is to get Bangladesh's political parties to agree to ground rules and an election timeline. Political parties are multiplying, and the

myopic ban on the Awami League could end up turning the former ruling party into a martyr. There is still a reservoir of support for the Awami League, even if it is less visible, and preventing the party from contesting elections could hand Bangladesh on a platter to corrupt or fundamentalist forces.

Voters should decide how much the Awami League should be punished. Encouraging younger supporters of the party who may wish to make a clean break with the Hasina years to be politically active would be the right step for the Yunus administration, but it is not possible if the party is deregistered and stays banned.

The future need not be bleak. Bangladesh's main virtue is that the country operates in spite of its government and not because of it due to its vibrant civil society. Its resourceful people know how to survive and thrive. The road ahead for Bangladesh is full of challenges. The hopes that were kindled last July may have dimmed, but they have not been extinguished. The dream of a democratic renaissance will require more than the fall of an autocrat; it will demand a sustained commitment to rebuilding institutions, protecting the rights of all, and fostering inclusive politics.

Until then, Bangladesh remains a nation in waiting—hovering between the shadows of its past and the fragile promise of a better future. ■

SALIL TRIPATHI is the author of *The Colonel Who Would Not Repent: The Bangladesh War and Its Unquiet Legacy* and *The Gujaratis: A Portrait of a Community*.

SOUTH ASIA BRIEF: *Michael Kugelman writes a weekly digest of news and analysis from India and seven neighboring countries—a region that comprises one-fourth of the world's population. Sign up for email newsletters at ForeignPolicy.com/briefings.*



Trump Will Lose the Trade War

By Robert D. Atkinson

The German high command learned a key lesson after losing World War I: to never fight a two-front war. That's why Germany signed the 1939 Molotov-Ribbentrop pact with the Soviet Union, which stated that neither country would attack the other for a decade. But Adolf Hitler couldn't count to 10, and Germany ended up in World War II—another two-front war that ended badly for Germany.

The same dictum goes for trade wars. It's OK to fight a one-front war but not a war with the whole world. As comedian Norm Macdonald joked on *Late Show With David Letterman* in 2015, "In the early part of the previous century, Germany decided to go to war, and who did they go to war with? The world. ... Then about 30 years pass, and Germany decides, again, to go to war. And, again, it chooses as its enemy the world!"

Now, U.S. President Donald Trump has decided to start a trade war, and who does he choose to attack? The world. In April, Trump imposed tariffs on most countries, even islands with

penguins and allies that run trade deficits with the United States. In August, he imposed a new round of levies on almost all nations.

The result is that the rest of the world appears to resent the United States now and is beginning to plan for a post-American trading system. Japan, South Korea, China, and members of the Association of Southeast Asian Nations are in talks to cooperate on trade, as are the European Union and China. Canada is also looking to the EU for closer trade and investment ties in light of Trump's tariffs.

Regardless, Trump seems to think that the United States is still the top dog, the head honcho, the boss. But it's time to face the facts: The United States will lose massively from his trade war.

The reason is simple. Too many U.S. companies, especially in advanced industries, need global market access to survive and thrive. The model Trump company is a low-to-moderate tech and nontraded U.S. company selling almost all its output domestically. Think kitchen knife makers, furniture producers, and golf club companies. (Does Trump know that he and his fellow country club members will soon pay more for a new set of irons?) If Trump protects these companies

from overseas competition, his thinking goes, these companies will thrive. How could they not with a large protected market?

Not so fast. The United States cannot be powerful without robust advanced industries. And those industries will seriously struggle in Trump's new world.

There are multiple vectors of challenge. The first is that U.S. firms that produce for export—think Boeing, Merck, General Electric, and others—will see their input costs increase significantly as they pay tariffs on imported components and materials.

Second, as other nations enact reciprocal tariffs, these companies' products will be priced out of foreign markets. Companies in other countries will buy South Korean memory chips rather than those manufactured by Micron. Airbus jets, not Boeing. Hitachi machinery, not Caterpillar. You get the idea.

On top of that, Trump is opening the floodgates for blatant discrimination against U.S. firms. The EU is using Trump's aggression to justify its "EuroStack": a plan to eventually replace almost all U.S. tech products, from computer chips to servers, with those made in Europe. And while the

bloc has finally announced plans to boost military spending, it will do so by purchasing European-made weapons.

This gets to a related challenge. While U.S. exporters under Trump's trade war will be increasingly shut out of foreign markets, their competitors will find themselves in a globally integrated market, albeit sans the United States. That will be particularly true as other nations take steps to create more integrated markets through new trade agreements. Foreign companies will have the scale needed to innovate and thrive. By contrast, U.S. producers, dependent on the relatively smaller U.S. market, will slowly shrivel and perhaps ultimately die.

Trump's import substitution strategy (ISI) has been tried elsewhere before. It failed. The international development community widely embraced ISI in the 1950s and '60s as a growth strategy—and many developing nations held onto it until the 1980s and beyond. One reason it failed was that countries, even relatively large ones such as Brazil, did not have big enough markets to efficiently make increasingly complex goods. A recent analysis of global industrial policies by the International Monetary Fund found that nations that adopted export strategies, such as South Korea and Taiwan, thrived—not those that championed ISI.

Even though the U.S. economy is much bigger than, say, South Korea's, today's advanced industries require larger markets than the United States can provide to survive—if only to generate the revenues needed to pay for continuous research and development.

But there's more. As the United States' role as the global trade hegemon wanes, China will surely take its place. Beijing has spent the last 15 years penetrating every global institution. With Trump leading the U.S. exit from many of them—such as the World Health Organization, the Paris Agreement, and the United Nations Human Rights Council—victory is China's.



U.S. President Donald Trump departs after signing executive orders imposing tariffs on imported goods during a trade event in the Rose Garden at the White House in Washington on April 2.

We are already seeing, and will likely continue to see, vastly more countries traveling to Beijing and kowtowing to Chinese President Xi Jinping to cut trade deals. Brazil and Colombia, once the largest recipient of U.S. economic assistance in South America, have already gone down that road. Chinese advanced industries may not have U.S. market access after the trade war, but they will have the rest of the world's. U.S. companies, meanwhile, will be left with the scraps of the domestic market.

After Trump's drawdown of foreign aid, China is also spending much more than the United States to win the hearts and minds of other countries. It doesn't take a weather person to know which way the wind blows: east. As Xi wrote in an article for a Russian newspaper ahead of his trip to Moscow in May, "unilateralism, hegemony, and acts of bullying are inflicting severe harm" around the world. Only Trump could make China look like the defender of free trade and solidarity.

To be clear, Trump needed to go to (trade) war with nations not playing fair. The top offender is China, which started the global trade war around 2006 and has ramped it up since Xi took office. Along with some other countries, Beijing has engaged in systemic mercantilist practices, helping to hollow out U.S. manufacturing and leading to massive U.S. trade deficits.

China conducted massive intellectual property theft. It bludgeoned foreign firms, forcing them to produce in China and transfer technology. Then, it closed its markets once it gained production capabilities in a particular industry.

U.S. attempts to address China's cheating through the World Trade Organization (WTO) have been few and far between, in part because the WTO is structured in ways that make effectively prosecuting such actions nearly impossible. U.S. firms also largely refused to cooperate with the WTO for fear of Chinese government

retribution. The same goes for the EU.

The relatively few cases the United States brought and won provided mostly Pyrrhic victories, such as quotas for rare-earth exports and wind power subsidies, neither of which changed competitive realities. And in most cases, China filed counter suits to U.S. suits. Trump was right: It was time to declare war. But not, as Macdonald would say, on the world all at once.

So, is there any hope? Probably not. But if Trump is one thing, it is unpredictable.

Here's what Trump should have done: First, focus on a few of the worst offenders of global trading rules, such as Vietnam, Indonesia, and India. Before imposing tariffs, invite those countries to talk, list key U.S. demands, and give them 90 days to fix them. Only impose tariffs if they refuse to respond. And while doing that, focus on the trade barriers and irritants that are most important to U.S. competitiveness in advanced industries.

If these nations want to expand their shrimp exports, then who cares? If they want to close their markets to U.S. whiskey, that's not worth fighting about. But attacking U.S. tech firms and limiting access to advanced U.S. goods and services—that's worth going to the mattresses over.

Then, pivot to Europe. After that, pivot to Japan, South Korea, and Taiwan. You get the picture. But don't go to war with the whole world at the same time. All that does is create a worldwide anti-American alliance.

When China conducts its trade wars, it has enough sense to not attack every country all at once. Beijing launches a trade strike on a particular nation and then waits for a bit, gauging the foreign response; when outrage has died down, it launches another. And like a frog in boiling water, other nations have taken China's blows with barely a whimper.

China remains the only country with the will and the means to destroy U.S.—and Western—advanced technology

industries. Trump's trade war should be designed to keep Beijing from winning. Above all, that means working with U.S. allies. But in the face of the United States' increasing hostility and declining power, many nations find it easier to cut deals with Beijing.

Without allies, any war is lost. Unless Trump shows a willingness to negotiate with U.S. allies—something he refused to do when he met with Canadian Prime Minister Mark Carney in May—the United States will be just as globally isolated as it was before World War I. However, the big difference between then and now is that technology requires U.S. firms to attain global scale to survive and that China has emerged to outcompete them.

We can only hope the United States emerges from its own multifront conflict better than Germany did. ■

ROBERT D. ATKINSON is the founder and president of the Information Technology and Innovation Foundation and an adjunct professor at Georgetown University's School of Foreign Service.

MAGA Is Not Isolationist

By *Adrian Karatnycky*

Recent shifts in U.S. President Donald Trump's foreign and national security policy herald a more vigorous use of Washington's military power and deeper engagement in the world. U.S. missile attacks on Yemen's Houthis, the bombing of Iran's nuclear production facilities, successful U.S. pressure on European NATO allies to prepare for the Russian military threat, the decision to provide Kyiv



A woman wearing a MAGA hat leads chants at a rally against the Iranian regime outside the Wilshire Federal Building in Los Angeles on June 23.

with additional weapons, and recent summitry aiming to end Russia’s war against Ukraine—all this and more signal Trump’s increasing willingness to shape the global arena.

This is a far cry from the inward-looking tone of Trump’s presidential campaign, during which foreign affairs took a back seat to domestic issues such as inflation and immigration. Indeed, Trump’s focus before taking office was on criticizing what he characterized as a trigger-happy, out-of-touch foreign-policy establishment that had needlessly launched costly wars in Iraq and Afghanistan.

Instead of these failed policies, Trump and his team offered a vision of peace through strength secured by a defense buildup that would deter enemies and preclude U.S. engagement in overseas conflicts. Trump emphasized his skills as a tough negotiator and promised to quickly resolve the wars raging in Europe and the Middle East.

To underscore this shift away from direct U.S. engagement in world affairs, many of Trump’s key appointments were advocates of an insular, “America First” foreign policy. These included Vice President J.D. Vance, social media mogul Elon Musk, Director of National Intelligence Tulsi Gabbard, and chief

technology advisor David Sacks. To be sure, these appointments were offset by the presence of important voices from the more traditional Reaganite wing of the Republican Party, including Secretary of State Marco Rubio and former National Security Advisor Mike Waltz, as well as advocates of a U.S. military buildup in Asia, such as Elbridge Colby, the Defense Department’s undersecretary for policy.

By focusing on peacemaking—primarily through his so-called “peace through strength” strategy—Trump was able to split the difference between his party’s isolationist and activist currents. However, in the aftermath of U.S. assertiveness in Yemen, Iran, and the Russia-Ukraine war, he has moved conspicuously toward a more muscular foreign-policy posture. Predictably, this has set off a debate among major Trump supporters in the news media and on social media, with Trump stalwarts such as Sean Hannity, Ben Shapiro, and Mark Levin defending his actions against criticism from figures such as Tucker Carlson, Rep. Marjorie Taylor Greene, and Steve Bannon.

This debate raises a crucial question: What does Trump’s electoral base think of his shift toward deeper international engagement, including military intervention in the Middle East? Is the Make

America Great Again (MAGA) base really as isolationist as conventional wisdom would have it? Recent polling suggests that the surprising but clear answer is “no.”

A June poll by the Reagan Institute showed that 83 percent of Americans surveyed believed that the United States should “stand up for human rights and democracy whenever possible.” This included 87 percent of Democratic respondents and 81 percent of Republicans. Interestingly, the poll showed higher support for a morally driven foreign policy among MAGA voters than other Republicans. (The Reagan Institute did not define how it categorized respondents as MAGA Republicans.)

More significantly, a larger proportion of MAGA Republicans (73 percent) than Democrats (65 percent) supported the view that the United States should “lead on the international stage.” Indeed, the overall mood of Americans tilts toward foreign-policy activism. Overall support for engagement was the highest registered by the Reagan Institute in six years of polling, with just 23 percent of those surveyed stating that the country should be less engaged. Just as significantly, the poll found that MAGA Republicans were nearly unanimous (96 percent) in their belief that

a strong U.S. military is a bulwark of peace and prosperity.

In the aftermath of Trump's attack on Iran, Republican support for Trump's actions stood at 82 percent, according to polling from the Tyson Group, well over double that of Democrats. Even allowing for reflexive partisan support, it is highly unlikely that support for military intervention in a conflict not directly threatening the homeland would be as high if the Republican base had embraced isolationism.

Indeed, all this data strongly suggests not only that Trump's base is far removed from isolationism today but also that it was never truly isolationist to begin with. Rather, MAGA skepticism about global engagement was the consequence of suspicion of the U.S. foreign-policy establishment—and what many MAGA adherents call the “deep state.”

Like most Americans, MAGA voters are deeply critical of U.S. interventions in Afghanistan and Iraq, which came at a massive cost of blood and treasure. Middle-class and lower-middle-class Americans, a major Trump electoral base, perceive that they and their children paid a high price for the miscalculations and misadventures of elites. This contributed to lingering distrust of what, in MAGA voters' eyes, was an out-of-touch establishment willing to risk American lives in pursuit of a “globalist” agenda or profits for the military-industrial complex.

Such conspiratorial beliefs were fodder for many Trump-adjacent media personalities and for MAGA isolationists such as Carlson, Gabbard, and Charlie Kirk. Other Trump-adjacent critics of U.S. interventions—such as State Department policy planning chief Michael Anton—made the broader case that U.S. power in the world was greatly diminished and that the country's policy must adjust to this reality by pulling back. Yet this neorealist mantra of a weakened United States (which itself recalls the thinking behind

U.S. retrenchment during the Nixon administration) stands at odds with the MAGA crowd's belief in U.S. greatness.

Fairly or not, the Trump administration's recent evisceration of the U.S. Agency for International Development, elimination of most foreign aid, cutback of the national security apparatus, leadership replacements in the U.S. military, and cuts in State Department staffing are seen by Trump voters as blows against what they view as an out-of-touch, elitist policy establishment dominated by liberal proponents of globalism and “wokeness.” Paradoxically, this weakening of U.S. institutions and soft power has solidified MAGA support for an activist foreign policy that is now seen as firmly in the hands of trusted leaders.

What, then, do these developments mean for the key challenges that the United States faces around the world? Generally, polling data shows that on a number of the key regions and global challenges that the United States faces, there is little evidence of isolationist sentiments among Republican voters and the Trump MAGA base.

On issues related to the Middle East, Trump's recent actions have won significant approval from his electoral base. Indeed, according to the Tyson Group polling, those who voted for Trump in 2024 were substantially more supportive of Israel than Democrats or independents, partly reflecting the country's strong support among Christian evangelicals.

MAGA voters' views of Ukraine are more complicated. Although they admire the Ukrainian people, they remain broadly opposed to carrying the financial burden for the war. A February poll of Republican primary voters, conducted by 1892 Polling, showed that 60 percent of those surveyed supported some military aid to Ukraine and nearly three-quarters saw Russia as the aggressor. While polling taken in the immediate aftermath of the Oval Office blowup between Trump, Vance,

and Ukrainian President Volodymyr Zelensky showed Trump supporters souring on the Ukrainian cause, that effect was temporary; a May Harris poll showed that 59 percent of Republicans still supported aid to Kyiv. Moreover, Republican support for Ukraine will now likely rise, given Trump's successful efforts to press Europe to take on the burden of financing Ukraine's defense, including by paying for U.S. weapons.

Republican voters also have a strong awareness of the growing military threat posed by Beijing. By a nearly 2-to-1 margin, they support military aid to Taiwan in the event of Chinese aggression.

Thus, there is broad-based MAGA and Republican voter support for both an engaged, tough-minded U.S. foreign policy in general and the Trump administration's specific foreign and national security priorities. Focusing on loud right-wing critics of Trump's recent foreign-policy decisions, such as Bannon, Carlson, and Greene, might make for exciting media coverage. But the reality is that Trump not only enjoys the confidence of his base on foreign policy but also has a MAGA constituency that is deeply committed to a powerful and engaged United States.

The conventional wisdom has it wrong: The MAGA movement has never been isolationist. Trump has its support to continue pursuing a more activist foreign policy, should he so choose. ■

ADRIAN KARATNYCKY is a senior fellow at the Atlantic Council, the founder of Myrmidon Group, and the author of *Battleground Ukraine: From Independence to the War with Russia*.

LATIN AMERICA BRIEF: *Catherine Osborn in Rio de Janeiro traces the contours of debates that shape the region's future, from geopolitics to business to human rights. Sign up for email newsletters at ForeignPolicy.com/briefings.*

EUROPE



Russia's War Is Also Cognitive

By Nataliya Bugayova

Russia is using cognitive warfare—a form of warfare that focuses on influencing an opponent's reasoning, decisions, and actions—to secure strategic objectives that are unattainable through its physical capabilities alone. It is not the only country to do so. China, Iran, and North Korea increasingly use cognitive warfare against the United States, too. But Russia has proved especially adept at using it to aid in its war against Ukraine, shape Western decisions, preserve President Vladimir Putin's regime, and mask Russia's weaknesses. Cognitive warfare is not the Kremlin's only warfighting strategy. Nonetheless, it is vital to understand the Kremlin's effort to try to make the world see things as Moscow wishes us to—and for us to then make decisions in that Kremlin-generated reality.

The ultimate target of Russian cognitive warfare is the opponent's will to act. To achieve more, Russia needs others to do less. Russia may very well lose if the West leans in to support Ukraine. The combined economies of

NATO countries, non-NATO European Union states, and the United States' Asian allies dwarf Russia's, among other things. The Russian goal has therefore been to have the United States reason its way to the conclusion that Russia prevailing in Ukraine is inevitable—or even in accord with U.S. interests—and that Washington should stay on the sidelines.

Cognitive warfare is not mere disinformation at a tactical level. Russia uses all platforms that transmit narratives—media, conferences, international frameworks, diplomatic channels, individuals—as tools of its cognitive warfare. The effort is also supported by physical activities. These physical tools include military exercises, sabotage, cyberattacks, and combat operations.

The Kremlin succeeds in this effort if it persuades others that it is too hard to know the real truth, too hard to resist Russia, and too hard to be sure which side is right and which is wrong.

Cognitive warfare is born out of need and opportunity. Russia is not weak, but it is weak relative to its goals. Putin's aims have remained largely the same for years: namely, preserving his regime; reestablishing Russia as a great power, which presupposes regaining control over the former Soviet states; and establishing a world order in which the United States is weakened, NATO's unity is broken, and Russia has decisive influence.

Putin lacks the means to achieve his goals, however. Russia is often neither strong enough to impose its will on others nor appealing enough to be a partner of choice. The country's sphere of influence is largely an invented one. Russia's neighbors are not willing to choose the country as an exclusive partner—if at all. Russia also lacks the military power to control others by force. It would take Russia more than 100 years to capture the remaining 80 percent of Ukraine at its current rate of advance, assuming that Russia can sustain massive personnel losses indefinitely. Other former Soviet states, such

as Moldova, have resisted the Kremlin's attempts at domination.

The Kremlin uses cognitive warfare to close gaps between its goals and its means. Its main cognitive effort is making the world accept, and never fight, Russian premises and actions. Russia will have a better chance of subjugating Ukraine if the Kremlin succeeds in making the world accept the false premise that Russian victory is inevitable and that continued Western aid to Ukraine is futile. Russia will have a better chance of imposing its will on others if the Kremlin succeeds in making the world accept the false premise that Russia simply deserves its sphere of influence.

The Kremlin has also been trying to portray Russia as righteous in order to limit resistance to Russian actions. It invests enormous energy in dismissing and concealing its atrocities.

Russian cognitive warfare is also about trying to conceal weaknesses while discrediting Russia's targets. Far from the Kremlin's portrayal of him as an effective war leader, Putin has, in reality, failed to achieve nearly all of his stated military objectives well over three years into the war—despite an estimated 1 million Russians being killed or wounded in the conflict. The Kremlin has been downplaying Ukraine's successes, such as its liberation of occupied territories, as well as Russia's failures, such as its inability to protect its international borders against the Ukrainian incursion into Kursk oblast.

Russia's cognitive warfare predates Putin's rule; in fact, it spans decades. The strategy is rooted in the Soviet concept of "reflexive control." Soviet mathematician and psychologist Vladimir Lefebvre defined the term in 1967 as a process of transferring the bases for decision-making from one opponent to another—in other words, trying to change people's reasoning processes to compel them to come to conclusions that, in this case, suit Russia and to act

based on these conclusions in ways that advance Russia's aims.

This process involves the recycling of Soviet messaging strategies and implements. Flaunting conventional power—nuclear weapons, the fleet, and missile systems—is a tactic that the Soviets frequently used in their strategic messaging against the West. The Kremlin invested in expanding the reach and capabilities of the state news agency TASS (founded as the Telegraph Agency of the Soviet Union) in 2013 and 2014. TASS was a major source of Soviet domestic and foreign propaganda and was present in 116 countries during the Soviet Union's rule.

The Kremlin intensified its external cognitive warfare efforts following a series of largely peaceful protests against corrupt regimes in former Soviet states, including Georgia's 2003 Rose Revolution and Ukraine's 2004 Orange Revolution. These countries' striving toward more transparent, Western-style governance threatened Russia's goal to control them, and Putin perceived this development as a threat to his regime. Putin has stressed over the years that the Kremlin "should do everything necessary so that nothing similar ever happens in Russia," and

the Kremlin launched a series of information operations to stop and reverse the loss of Russian influence in Ukraine and other former Soviet states.

Russia started to seed narratives about separatism in Ukraine as early as 2004. A decade later, in 2014, these narratives were used as a foundation of Russia's hybrid operation aimed at seizing Ukraine's eastern and southern regions and then its full-scale invasion in 2022.

The Kremlin has prioritized the expansion of its media conglomerate globally. The 2016 Foreign Policy Concept document named "strengthening Russian media's positions in the global information space" among its priorities. During the same decade, Kremlin-controlled media organizations RT, TASS, and Sputnik launched a concerted effort to form partnerships with foreign media. The Kremlin has also been investing in a generation of Russia-favorable journalists through training programs.

Some Russian military writers have even argued that all activities, including kinetic operations, must be aimed at achieving informational effects. Russia's 2016 Information Security Doctrine called for an independent Rus-

sian information policy, the segmented management of the Russian internet, and the elimination of Russian dependency on foreign information technologies. The country established the Military-Political Directorate in 2018 to instill the Kremlin's ideology within the Russian armed forces. The Soviet Union similarly integrated political officers into its military to ensure the military's alignment with the Communist Party's ideology and objectives.

Putin has relied on this capability not only to wage wars but also to govern. In the early days of Putin's presidency, Russian security services raided a major independent TV station. By 2003, he had established state control over Russian media. Every year since 2000, the Kremlin has introduced new forms of information control, and Putin has expanded his censorship regime since launching his full-scale invasion of Ukraine. In April, the state sentenced a Russian teenager to nearly three years in prison for using 19th-century Ukrainian poetry to protest Russia's war against Ukraine. The Kremlin's efforts to create a national instant messaging platform are among its latest attempts to expand monitoring of domestic communications.



Russian President Vladimir Putin speaks in St. Petersburg, Russia, on June 20.

All this is effective—but only to a point. Cognitive warfare allowed Russia to make some gains that would have been impossible with conventional forces alone. The information backdrop of the Kremlin-induced escalation anxiety has shaped Western decisions about provision of military aid to Ukraine, resulting in lost opportunities for Ukraine and battlefield advantages for Russia.

Yet the Kremlin is overly dependent on cognitive warfare. It is also vulnerable to realities that undermine the narrative of a powerful Russia and a powerful Putin—one of Russia's major unexploited weaknesses.

The key to defending against Russian cognitive warfare is doing so at the level of strategic reasoning while resisting the urge to chase Russia's tactical disinformation efforts. The United States should understand what premises the Kremlin wants it to believe, which of Washington's decisions it is trying to shape and in support of which aims—and then should reject the premises that the Kremlin is trying to implant. For example, the United States has an opportunity to dismantle the notion that Russia is entitled to its claimed sphere of influence or the claim that Russia will inevitably win militarily in Ukraine.

Actions are often the most effective ways to neutralize cognitive warfare. It was Ukraine's successful drone and missile strikes against the Russian Black Sea Fleet that vanquished Russia's effort to create a false perception that Ukraine was spoiling global food security. Ukraine's military action denied Russia the ability to impose a de facto blockade and, as a result, enabled grain trade through the Black Sea.

While specific Russian narratives may change, the larger premises that the Kremlin is trying to establish through these narratives do not; neither do the overall goals that this cognitive warfare supports. This provides an opportunity for systematic situational

awareness to monitor, forecast, and neutralize Russian cognitive warfare.

Russian overreliance on this capability has degraded the country's real power and brought destruction to its society—damage that will take Russia generations to recover from, if recovery is at all possible. The West is best served by neutralizing Russian (as well as Iranian, North Korean, and Chinese) cognitive warfare efforts by revealing them, working to reject the false premises that they seek to create, and focusing on the real world, rather than operating within the artificial reality that cognitive warfare efforts seek to create. ■

NATALIYA BUGAYOVA is a nonresident Russia fellow at the Institute for the Study of War (ISW). This article is adapted from a ISW report written by Bugayova and Kateryna Stepanenko.

Europe Has a France Problem

By Eoin Drea

For the French political elite, this is a moment of scarcely concealed glee. The Trump administration's deep hostility toward Europe—including the imposition of steep tariffs, verbal attacks on European values, open support for far-right parties, and threats to invade Greenland—vindicates the vision of a strategically autonomous continent held by generations of French leaders. It was French President Charles de Gaulle, after all, who repeatedly expressed his belief in the 1960s that it was France's mission to liberate Western Europe

from its role as a de facto U.S. protectorate after World War II.

For President Emmanuel Macron, “this concept of sovereignty, which just seven years ago may have seemed very French, has gradually become European.” French policymakers see it as the realization of a long-held dream, one of a European Union in France's image—no longer aligned with Washington, fiercely protective of its companies, and unconstrained in its government spending. In this reimagining, Paris is working under the guise of strategic autonomy to make the EU a greater France.

Exhibit A is the fight within the EU over how the continent's rearmament should proceed now that Washington has finally cajoled NATO allies to spend a minimum of 5 percent of GDP on defense. Most of Europe—from Germany to the Nordic countries to the eastern frontier states—sees an urgent need to fill their arsenals to ward off the growing threat of war with Russia. That makes them willing to buy from whoever can deliver the required weapons the fastest, regardless of whether those weapons are manufactured in the EU, Britain, South Korea, or the United States.

France, on the other hand, sees the new spending targets—and the joint EU fund that has been instituted to help finance them—as a giant pot of money that it can use to nurture its defense companies. The launch of the Security Action for Europe fund—a 150 billion euro (around \$173 billion) program financed by EU borrowing to enable joint procurement by member states—was marred by France's fierce resistance to allowing any of the funds to be used for buying weapons from non-EU companies. At France's behest, even the United Kingdom's world-class arms-makers are excluded from the funding.

Similarly, France held the even more important European Defence Industrial Programme (EDIP) hostage by seeking to exclude all non-EU companies

—even if their production is based in the EU and employs European workers. The final compromise was that, in order for a purchase to be eligible for EDIP financing, at least 65 percent of the components by value must originate in the EU or certain associated countries. Even this compromise drew dissent from 10 member states that sought greater flexibility to buy non-European weapons immediately.

Paris has argued that Europe needs its defense industry to be completely independent from the United States. This is not unreasonable, given the example of the Biden and Trump administrations severely restricting Kyiv’s permitted use of U.S. weapons at the cost of the lives of thousands of Ukrainian soldiers and civilians. What if Russia attacks an EU country while a Kremlin-friendly U.S. president sits in the White House and, say, turns off the software running on U.S.-made weapons? The problem is that building up Europe’s atrophied defense industry to deliver at the required speed and scale is a long-term project. Outside of France, just about every EU country envisions doing both—building up local production capacity while also buying what’s needed from other suppliers now. While some countries are certainly nervous about buying U.S. weapons, few outside of France see a need to boycott U.K. arms-makers, as Macron would like Europe to do.

For Paris, rearmament has become the Trojan horse to finally realize its goal of massive joint borrowing, which it has spent decades advocating for—and, ultimately, the removal of constraints on French state spending not only on defense but in all other areas, as well.

After all, in France, the largest parties in Parliament want to lower the retirement age to 62, at the cost of immense new outlays for the public pension and health care systems. Similarly, Macron is busy reassuring voters that defense spending can meet the new NATO target of 5 percent of GDP

French President Emmanuel Macron holds a news conference after a European Council summit in The Hague, Netherlands, on June 27.



without any need to raise French taxes.

Macron’s needs are vast and urgent. France’s public debt relative to GDP is on track to hit an astonishing 118 percent in 2026 and to exceed that of crisis-ridden Greece by the end of this decade. The last time Paris ran a budget surplus was 1974. With the highest tax burden in the EU, it is simply not possible to “raise taxes since they are already very high,” as former French Transport Minister Clément Beaune delicately put it last June. To add insult to injury, the financial markets now view France as a worse credit risk than Greece or Spain, which were close to default during the eurozone debt crisis in the early 2010s.

Instead of acknowledging spending constraints, French proposals invariably focus on avoiding political choices, preferably with the help of a “large EU debt fund.” Of course, all European governments face the problem of having to tell voters accustomed to perpetual peace and growing welfare states how rising defense outlays will be financed. But the French attempt to avoid difficult choices by free-riding on the grandest of scales is unique.

And therein lies the heart of Macron’s vision for Europe: exporting French economic weakness and overspending to the rest of the EU under the guise of European integration. For French

leaders, “strategic autonomy” in defense has thus become a euphemism for a whole basket of policies they’ve been advocating for years: excluding global competition, subsidizing industry, and forcing other EU members to accept joint borrowing so that France doesn’t have to raise taxes. It’s the old Paris playbook recharged by Trumpism and updated for an age of war.

Few—if any—of the EU’s other 26 members share Paris’s enthusiasm for a French-style, highly subsidized, and walled-off Europe. Rather than ushering in an era of French-led integration, Macron’s relentless push for an independent Europe is deepening the continent’s divisions.

Central and Eastern European countries find French protectionism particularly aggravating. These states have long seen purchases of U.S.-made fighter jets and other weapons as an insurance policy that helps keep Washington on their side. Lately, South Korea has emerged as another critical military supplier for Poland, Romania, and other countries in the region.

That has not kept Macron from pushing ahead. His latest tactic is an attempt to strike a grand bargain with Germany to win support for his agenda. Specifically, it involves the extension of France’s nuclear umbrella over Germany—although it is unclear what that

would mean in practice—in return for Berlin’s assent to more joint EU borrowing and a substantial loosening of eurozone limits on debt and deficits. By exchanging France’s nuclear deterrent for Germany’s deep pockets, this bomb-for-debt deal would paper over France’s economic weakness.

German Chancellor Friedrich Merz has his own reasons for facilitating France’s strategy. He faces a stagnating German economy hit especially hard by U.S. tariffs and Chinese overproduction; surging support for far-right populists; and a desire for bold action after two decades of malaise during the Olaf Scholz and Angela Merkel eras. The French plan involves tying Germany into a series of centralizing initiatives wrapped in a European flag. Paris views sectors such as telecommunications, artificial intelligence, cloud computing, aerospace, and defense as being ripe for the creation of European champions—ideally French or French-controlled. By counting on Merz’s need to act, France seeks to sideline other EU member states that might oppose its agenda.

A grand Franco-German bargain that hurts just about everyone else has a historical precedent, of course. The last great Franco-German trade-off was French President François Mitterrand’s acquiescence to Germany’s 1990 reunification in return for German Chancellor Helmut Kohl accepting the creation of the euro to replace the strong German mark and other European currencies. Mitterrand believed that “without a common currency, we are all already subordinate to the Germans’ will.” That currency union remains a key driver of political discord and economic stagnation in Europe. Despite circulating for more than 20 years, the euro is part of an unfinished and structurally unstable monetary union, whose crises have imposed profound economic and social costs on countries from Ireland to Greece.

Just as it did in 1990, France is now

seeking to export its economic weakness to the rest of Europe. The future result will likely be similar: a half-finished, inherently unstable, and Europeanized security infrastructure mirroring the EU’s incomplete currency framework.

Whether or not Macron can get Merz on board, France’s persistent belief that its own priorities should be Europe’s has alienated most of its EU partners. Lacking economic credibility, France has become just another mismanaged member state seeking an EU bailout to avoid a looming debt crisis.

Unwilling or unable to build the required relationships with EU partners—particularly the eastern frontline states—and shape the subsequent compromises, France is keeping Europe weak and split by its divisions. Europe’s foes in Beijing, Moscow, and Washington will be all too happy to exploit them in the coming years. ■

EOIN DREA is a senior researcher at the Wilfried Martens Centre for European Studies.

Russia’s Submarine Plans Are Bad News for the West

By Elisabeth Braw

Many a tear has been shed lately for the *Admiral Kuznetsov*, Russia’s only aircraft carrier. After a long and unlucky life, the ship endured a retrofit so ill-fated that it’s now about to be scrapped. But don’t feel too smug about Russia’s soon-to-be carrier-less

navy because it’s expanding its already fearsome submarine fleet instead.

In recent times, even news outlets that rarely report on military equipment have run big headlines about the *Admiral Kuznetsov*, a Soviet-built ship that has been Russia’s only aircraft carrier for 40 years. More than 1,000 feet long and with a range of 9,800 miles, the ship was a serviceable design from the late 1980s but always behind the times compared with its U.S. counterparts.

But the *Admiral Kuznetsov* has had so many mishaps that people have begun feeling sorry for it. There were canceled deployments, repairs, and a lot of idle years. When the ship finally participated in a combat deployment, sailing to Syria in support of President Bashar al-Assad in 2016, it lost two aircraft.

In 2017, the aging ship was sent to Murmansk for repairs and a retrofit, a process that has dragged on and on. The following year, the dry dock in which the ship was being repaired sank. The year after that, a major fire erupted on board, killing at least one person and injuring 10. In 2021, the director of one of the ship repair plants was arrested on suspicion of embezzling money earmarked for the repairs.

The *Maritime Executive* reported in July that Russia’s 2022 invasion of Ukraine cut off “its supply chain for Soviet-compatible marine engines and spares—a niche that Ukrainian factories had filled for Russia’s navy since the communist era.” Then another fire broke out on board the *Admiral Kuznetsov* in December 2022. And now comes the news that the ship may be scrapped altogether. All this evokes memories of the hapless Russian guided missile cruiser *Moskva*, which Ukraine dramatically sank in the Black Sea in 2022.

But any snickering at the Russian navy would be sorely misplaced. “The Russian navy does not need aircraft carriers in the classic form,” said Sergei Avakyan, a former commander of Russia’s Pacific Fleet. “The aircraft



The crew of the *Knyaz Pozharsky*, a Borei-class nuclear-powered ballistic missile submarine, await Putin at a shipbuilding plant in Severodvinsk, Russia, on July 24.

carrier is already a part of a bygone era. [It is] a huge, expensive structure that can be destroyed in a few minutes with modern weapons.”

Russia has long recognized that it is not able to compete with the United States’ carrier battle groups. Over the past several years, it has instead been busy expanding its already respectable submarine fleet—taking a distinct stance in the long-running debate over whether or not carriers are inherently obsolete in an era of missiles and stealth submarines. Submarines, with their inherent stealth capabilities, have often been the choice of the weaker side; the German navy couldn’t take on the British Royal Navy in 1917 or 1940, but it could deploy submarines to try to wreck British ships.

Russia introduced 13 new submarines to its Pacific Fleet between 2013 and 2025, including five Borei-class vessels that are nuclear-powered. “The Russians are not going to invade America,” said John Aitken, a veteran submariner who was a commodore and deputy director of submarines in the Royal Navy until last year. “But what they might do is invade Europe or part of Europe or a European country.” Submarines, Aitken added, could allow Russia to threaten carrier-defended U.S. battle groups in the absence of effective fleets.

This may not be a cutting-edge strategy, but the Kremlin appears to be fully

invested. In July, Russian President Vladimir Putin called the submarine expansion “crucial” and highlighted the future acquisition of four more Borei-class vessels. But the submarines have uses far beyond thwarting U.S. naval deployments to Europe, and unlike the ill-fated *Admiral Kuznetsov*, they see regular use.

In June, one of them sailed through the North Sea and the English Channel. “The Russians are looking at the Arctic, and elsewhere at the same time they’re looking at the North Atlantic,” Aitken said. “And it’s not just their nuclear boats. The latest batch of [Kilo-class submarines] are very capable, and they have some in the Black Sea, they have some in the Baltic Sea, and they have some in the Barents Sea. We’ve seen a huge upswing in the amount of activity by the Russian forces all along Russia’s Arctic coast.” Putin delivered his pro-submarine speech in Severodvinsk, where the latest Borei-class submarine is being commissioned.

Submarines are in vogue. Right now, Europe, Russia, and the United States have fleets that are around the same size—but they’re all looking to expand. NATO member states have recognized where maritime warfare and deterrence are headed. In June, the United Kingdom announced that it planned to acquire up to 12 new attack submarines, a dramatic increase from

the Royal Navy’s current fleet of nine. Another two are going to enter service in 2026, including one that was delayed following a major fire in the shipyard at Barrow-in-Furness.

Germany commissioned six new submarines to be built—two for itself and four for Norway—in a rare case of successful joint procurement. Sweden has ordered two. Australia struck a critical submarine deal with the United States and the U.K. in 2021, though it is now under threat by the Trump administration. But because weapons orders are a multiyear process, it will be years before the submarines get a chance to protect NATO waters.

The primary task for Russian submarines today is testing their own abilities and reconnoitering those of NATO. But their use could get a lot more aggressive—and determining just what Putin’s plans are is the responsibility of Western politicians, naval officers, and intelligence analysts. Russia’s record at sea has always been weak for a power of its size, from the destruction of its fleet by the Japanese at the Battle of Tsushima in 1905 to Ukraine sinking the *Moskva* in 2022. But it’s still a threat, and the asymmetric power of submarines makes it a real challenger to U.S. strength. ■

ELISABETH BRAW is a senior fellow at the Atlantic Council and columnist at FOREIGN POLICY.



THE GREAT AID HYPOCRISY

*The West's development model
was always a mirage.
It's time for a realistic alternative.*

BY ADAM TOOZE

T

he first week of March featured a moment of dark political comedy worthy of *Veep* creator Armando Iannucci. In a scene that felt scripted for satire, the United States became the sole nation in the U.N. General Assembly to vote against the establishment of both an International Day of Hope and an International Day of Peaceful Coexistence. More astonishing still was the formal letter read out by Washington to explain its position on the latter resolution.

In the letter, the U.S. government categorically rejected the entirety of the United Nations' Sustainable Development Goals, or SDGs. This wasn't simply a withdrawal, as from the climate commitments of the Paris Agreement; it was an unambiguous denunciation of the collective ambition to improve the material condition of humanity. American voters, the letter claimed, had delivered a clear mandate in the last election: Their government must put America first, caring first and foremost for its own.

Yet the justification did not stop at nationalism. It expanded into a broader geopolitical critique. The letter argued that the resolution's language—specifically, its reference to “peaceful coexistence”—could be read as an endorsement of China's Five Principles of Peaceful Coexistence. Similarly, the United States objected to the resolution's phrase “dialogue among civilizations,” interpreting it as a nod to Chinese President Xi Jinping's Global Civilization Initiative.

In effect, the U.S. position framed the resolution as a covert endorsement of Chinese Communist Party (CCP) ideology and sought to delegitimize the SDG framework by painting it as ideologically compromised. For good measure, the letter added sideswipes against “gender” and “climate ideology.”

While the rest of the world proceeded with the vote, the Trump administration's intervention laid bare the fact that the apparent consensus around the SDGs—touted since 2015 as a universal blueprint for development—had collapsed.

This blunt-force critique is an embarrassment, and the U.S. cancellation of much-needed aid is a crime against commonsense humanitarianism. But indignation at the Make America Great Again (MAGA) crowd should not be allowed to smoke-screen a broader and more comprehensive failure.

The broader vision of the SDGs was always a gamble at long odds, and in practice, it has delivered so little that it raises the question of whether it was ever anything more

than a self-serving exercise on the part of global elites. For the sake of their own collective vanity, they needed to convince themselves and the world that they had a comprehensive and bold vision. But it's something else to mobilize and sustain an effort to realize the SDGs.

And this, in turn, reflects a refusal to admit what development actually means or to anticipate how the status quo powers will react once it happens. With hindsight, the SDGs, for all their capaciousness and generosity of spirit, seem like an effort to craft a world organized around a spreadsheet of universal values rather than politics and around a happy blend of public and private economic interests.

This may promise a “better world.” But it is a world beyond conflict and politics, a last gasp of “end of history” thinking. On that score at least, MAGA may even have a point.

SUSPICIONS ABOUT THE HYPOCRISY of the West's approach to development deepen when we observe what happens when development occurs.

China, the greatest success story in development history, has lifted hundreds of millions of people out of poverty. Foreign aid, investment, and trade helped, but the real engine was domestic mobilization and state-directed investment. Perhaps for this very reason, China's success has not fostered greater trust or agreement on a rules-based order. Instead, it has triggered a new cold war.

Following U.S. President Barack Obama's pivot to Asia, during Donald Trump's first term, the Biden administration, and Trump 2.0, China has been clearly identified as the pacing threat or challenge of the Defense Department. This is down to China's increasing sophistication in military technology and its revisionism in the South China Sea. But above all what motivates this ranking is China's economic heft, which Beijing itself understands as overcoming “centuries of humiliation.” In the age of powerful nation-states, development, whenever it is of significant scale, almost by definition means a threat to the international status quo.

If China doesn't prove the point, Russia does. Russia in the late 1990s was on the edge of becoming a basket case. Its first elected president, Boris Yeltsin, was deeply beholden to Washington. Both current President Vladimir Putin's

The broader vision of the SDGs has delivered so little that it raises the question of whether it was ever anything more than a self-serving exercise on the part of global elites.

strategic independence and his domestic legitimacy are built on a track record of economic and financial recovery. And this, too, is powered by a sense of historical missions, fueled by grievance. From the moment he rose to power, Putin has always seen economic development, national resurrection, and self-assertion, if necessary with hard power, as indissoluble.

Nor should that be surprising. Putin's decision to launch a full-scale war on Ukraine in 2022 was a misjudged, high-risk gamble. But his tendency to throw his weight around, far from being the exception, conforms to the historical norm. His brutal version of great-power policy, in which economic capacity and collective welfare are seen as being in the aid of national sovereignty and state power, is not the logic of an ancien régime balance of power. Putin's progenitors are the exponents of aggressive 19th-century imperialism.

And in the shatter zones of that period of turmoil, notably the Middle East, that logic is still at work today. For an example, look no further than Israel, Turkey, and the United Arab Emirates, fissile products of the history of power play between the Ottoman and the British empires in the Middle East.

Modern development economics itself was not born of geopolitical innocence, far from it. Beginning with thinkers such as Friedrich List, writing in the 1830s, it was tied to the emerging national interest of the early United States and the aspiration to German unification. In the 1920s and '30s, the technocratic elites of the embattled, newly independent nation-states of Eastern Europe and the Western European imperial regimes advocated for the deliberate promotion of state-led economic growth. The Poles and Romanians wanted to develop themselves to ward off their avaricious neighbors. In a democratic age, the Dutch, the French, and the British needed to modernize their colonies and make them pay for themselves.

Development economics both in theory and practice really came of age above all with U.S. sponsorship in the Cold War struggles over decolonization. These shaped a new understanding of the world as divided into three great zones: the U.S. bloc of the First World; the communist Second World; and the Third World, to which development policy was to be applied. Under the guise of the Marshall Plan in Europe or in Latin America, Indonesia, or Vietnam, U.S. development economics was an antidote to the rival models of development, politics, and geopolitical alignment offered by Joseph Stalin's Soviet Union and Mao Zedong's China.

Its track record was patchy to say the least. Outside Western Europe, the best results were achieved, not by coincidence, in the East Asian states most closely aligned with the United States: Japan, South Korea, and Taiwan. They were tightly integrated into U.S. grand strategy in Asia. Nevertheless, too much success could be a problem.

The best results were achieved, not by coincidence, in the East Asian states most closely aligned with the United States. Nevertheless, too much success could be a problem.

In the 1980s, many Americans worried about the technological challenge from Japan. This original specter of "Asian invasion" powerfully shaped Trump's bleak views about the harm done to the United States by free trade.

The successes were the exceptions. In general, the 1970s and '80s were a disastrous period for development policy. Latin America was reeling from debt crisis. Sub-Saharan Africa was ravaged by HIV/AIDS. India was mired in extreme poverty. China was only beginning to scramble its way out.

With the Cold War over, it was against this stark backdrop that development economics in the 1990s took a new, universalist turn. The 1987 Brundtland Commission report brought the idea of sustainable development into the mainstream, promising a new synthesis of values rooted in a common interest in ecological balance.

This was then elaborated on, by way of the 1992 Earth Summit and the 1995 World Summit for Social Development, into six monitorable international development goals. These offered a blend of basic material aspirations—halving poverty, achieving universal primary education, reducing infant and maternal mortality—with wider social goals. The U.N. went on to articulate its anti-poverty priorities in the eight Millennium Development Goals, or MDGs, which, together with the extensive engagement of private philanthropy in global public health and comprehensive debt relief, would give poorer countries a fresh start in the new age of globalization.

In Central Africa, the disasters continued. But after the shock of the 1997 crisis had worn off, the Asian giants—most notably Bangladesh, China, India, and Indonesia—achieved remarkable progress. And that, in turn, fed a commodity boom that translated into a considerable uplift for Latin America's new middle class.

IT WAS ON THE BACK OF THIS REMARKABLE PHASE of "global growth" that the drafting began for the SDGs. The aim by the 2010s was comprehensive. No one was to be left behind. Development was a human right. And development was to be made sustainable. Not imperialism or geopolitical rivalry but the environment was seen as the ultimate constraint.

The SDGs were born from the more focused MDGs. Along the way, they accumulated a vast set of aspirational targets

and technocratic ambitions, summarized in 17 goals and 169 targets, which critics saw as overly idealistic or utopian. The hope was that politics and geopolitics could be transcended by a comprehensive grid of targets and colorful infographics. To this day, enthusiasts wear a colorful wheel pin to signal their adherence.

The trifecta of global agreements in 2015—the Addis Ababa Action Agenda on finance, the U.N. vote on the SDGs, and the adoption of the Paris Agreement—set in motion a cottage industry of economists, who converged on the idea that investments of around \$5-7 trillion per year, roughly 5-7 percent of global GDP, were needed to drive global progress toward a sustainable and prosperous future. Of that amount, roughly \$4 trillion in additional spending was required to meet the needs of the developing world. The key to a better future was a giant investment boom.

On the face of it, this kind of “Big Push” planning was a throwback to 1950s state-centered economic development. After decades of neoliberal austerity, there was no appetite for a revival of “big government.” Bridging the gap was the job of a new economic specialty called development finance. Its core idea, known as “blended finance,” proposed that public funds, rather than bearing the full weight of development, should be used to “de-risk” private investment, thus allowing billions of dollars in government aid to be turned into trillions in private investments.

This optimism—or should we call it hype?—reached its high point at the 2021 U.N. Climate Change Conference in Glasgow, Scotland, where global financial institutions touted the possibility of leveraging billions in public funds to unlock more than \$130 trillion in private finance for green energy and sustainable development. At the summit of this apotheosis of development finance stood none other than future Canadian Prime Minister Mark Carney, then fresh from his stint as governor of the Bank of England but already a charismatic figurehead of global centrism.

In retrospect, the SDGs now look less like a new dawn than the final gasp of a unipolar, end-of-history fantasy. Rather than billions leveraging trillions, the track record of blended finance is dismal. It is rare to see more than cents on the dollar mobilized in private money. In key areas of innovation such as green energy and artificial intelligence, the developing world, far from catching up, is left even further behind.

Measured against the declared ambitions of the SDGs, this is disappointing. But how seriously were those visions ever intended? Did anyone in 2015 ever contemplate what a world would look like in which they were realized? Imagine, for instance, if Brazil were actually to become an economic and technological powerhouse like Japan. Or if Ethiopia or Nigeria reached Turkish levels of state capacity and GDP per capita.

Such scenarios evoke shoulder shrugging, partly because such futures are deemed implausible—but also because on closer inspection any such scenario is distinctly uncomfortable. The geopolitical ramifications would be incalculable. Imagine, for instance, if Mexico achieved the GDP per capita of Canada. Would that pose a disconcerting challenge for the United States? Of course it would. In the meantime, it’s easier to see that particular set of SDGs as aspirational rather than real.

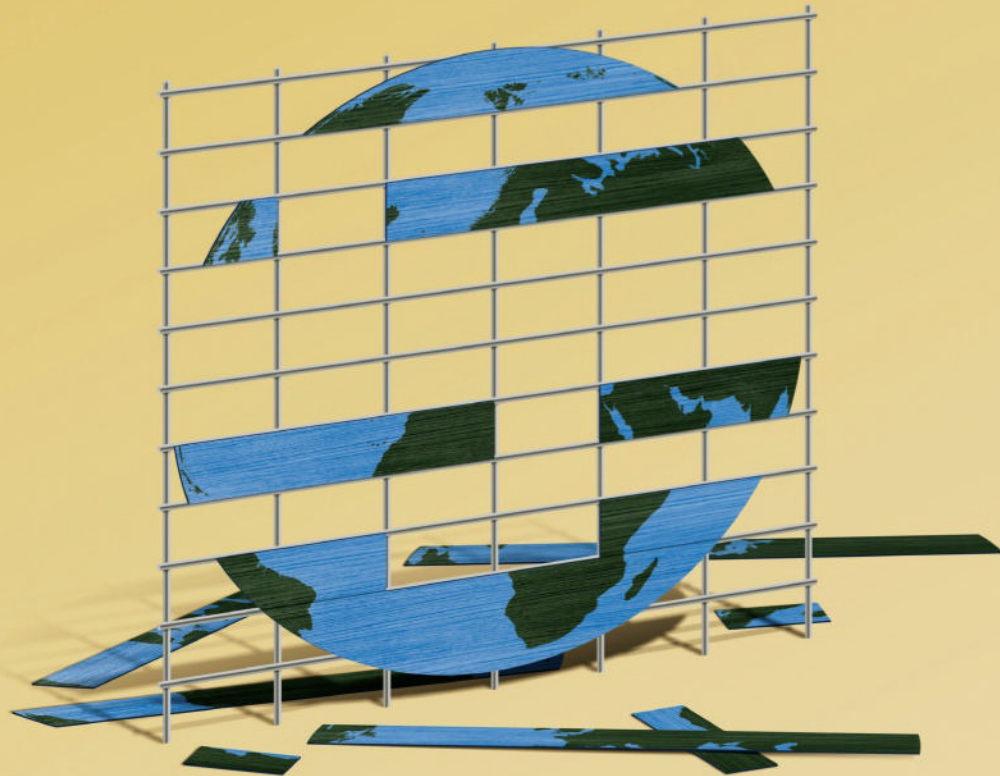
The coming African century presents the same dilemma in particularly stark form. The demographic forecasts for the coming decades are loud and clear. Africa’s population density is set to surge in many places to European levels. Its share of the global population is projected to top 25 percent. By 2050, 40 percent of all births will be in Africa, and its share of young workers will be far larger. Yet the rest of the world has no real conception of what such a future might look like, when cities in Nigeria or Tanzania are major centers of globally significant tech innovation. How challenging this might be is indicated by the examples of Ethiopia, the Houthis, and Rwanda—each of which demonstrates how development confers real power: the ability, for better and for worse, to project force, shape narratives, and pursue national projects.

And as these examples show, it is not just relative scale that matters but absolute levels and thresholds. Rwanda is far from overall prosperity, but it already has a capable military. The Houthis, who do not even have a monopoly on power in Yemen, can nevertheless hurl missiles against Israel, wage war on global shipping, and fight skirmishes with the navies of the rich world.

Development is thus inherently political. It is about power—the ability to act. A more developed world is, by definition, more multipolar and less controllable.

Given the idiosyncrasies of the Trump administration, the effects of this general tendency are illustrated more clearly by the reactions of the Europeans. France, Germany, and the United Kingdom all style themselves as upholders of the rules-based international order. They all profess loyalty to the SDGs and would not be caught dead voting against peace and hope at the U.N. But, like the United States, they have all also been slashing their aid budgets. Why? Because of Ukraine. If national security is paramount, then missiles

Development is about power—the ability to act. A more developed world is, by definition, more multipolar and less controllable.



vehicle of U.S. power. What made the largest aid operation in the world an effective vehicle of U.S. influence were not just its propaganda efforts but the fact that it actually saved lives.

A realistic approach for the post-Trump era needs to start not by dismissing the very idea of development but by distinguishing different imperatives.

If we are not to fall victim to our own euphemisms, we need to recognize that saving lives and development are not the same thing. To conflate the two is to unconsciously echo the bland universalism of the SDG era—an era in which there were officially mandated targets for everything and everyone, whether for starving children or 5G broadband access. The statistical category of overseas development assistance covers everything from support for

and tanks are better strategic investments than unavailing efforts to bring sustainable development to the Sahel.

Whatever happens to the individual components of the SDGs—worthy objectives such as reducing child mortality and digital inclusion—one thing is for sure: The age of a politically neutral, universally endorsed development agenda is over.

THIS DOESN'T MEAN chaos is inevitable. As the international relations constructivist Alexander Wendt reminds us, “Anarchy is what states make of it.” And it is precisely that which makes the belligerent behavior of the Trump administration not just embarrassing and inconvenient but dangerous. Yes, the SDGs were hypocritical. But tearing them down with no replacement is not realism—it’s nihilism.

The passing of the SDGs should be a cause for real regret. Theirs was an extraordinary and comprehensive vision. Along with the Paris Agreement, they marked a high-water mark of a certain kind of universalism.

And we should certainly not fall into the facile cynicism that says good riddance not only to the SDGs but to the U.S. Agency for International Development on the grounds that it was a

Ukrainian refugees to actual infrastructure development and emergency assistance in Sudan.

Where foreign money is most essential and where aid cuts will most cost lives is in the relief of refugee crises and ongoing medical emergencies, such as HIV/AIDS, malaria, and tuberculosis, in situations of failed states and desperate poverty—not in “development” per se.

The fact that aid is needed, of course, signifies a broader failure. Ukrainian refugees in Germany and Sudanese refugees in Chad are in very different situations. But as important as it may be to address the longer-term development issues of both Sudan and Chad, and as much as Germany has work to do in integrating migrants into its workforce, the immediate priority is to keep people alive.

As World Bank data reveals, half of the most miserable people today, those in the direst poverty and suffering from severe nutritional risk, are concentrated in fragile and conflict-affected states, in Afghanistan and Myanmar but above all in Syria, Yemen, and sub-Saharan Africa. Basic relief aid and in-due-course adequately funded and well-organized peacekeeping are the key. The aim is not the ambitious and

long-term goal of development but basic civil order and the prevention of famines and epidemics.

Though this is not development in any long-term sense, it is a worthy and essential role for international action. Appeals for the worst crisis areas are chronically underfunded, and any rich country wishing to do some good could simply step into the breach. As was demonstrated in the case of the Syrian crisis, a spartan but well-organized system of refugee camps like that run in eastern Turkey can save millions of people from the worst misery and contain the risk of further regional destabilization.

AS FAR AS ACTUAL DEVELOPMENT is concerned, it is clearly true that there isn't a general formula for success. Spending billions is no guarantee. But that is as banal as saying we don't have a general formula for turning history in our desired direction. Development is not simply engineering or dentistry, though it no doubt involves building bridges and fixing people's teeth. In all cases where it has achieved dramatic impact, it is deliberate social transformation, history-making on the grandest scale. It is best understood not by formulas but by an interconnected history of combined and uneven development.

A large injection of aid into a regime lit by a sense of historic purpose and backed by substantial political and social forces, as, for instance, in post-genocide Rwanda, can yield real benefits. A sprinkling of tied loans across isolated projects in a corrupt and unaccountable regime will, unsurprisingly, do little more than feed the aid industry and enrich a few more-or-less unscrupulous individuals.

What matters is clearly to pick partners and build launching pads for self-sustaining progress rather than dependence. A competent state is also one that can handle outside injections of aid without becoming morbidly addicted to them—and putting that aid to good use will further enhance its competence.

What is required to identify such states—and the attendant possibility of unleashing such cumulative development processes—is on-the-ground knowledge, long-term commitment, judgment, and a willingness to bite the bullet on tough choices. External assistance can only be a supplement to the hard business of domestic resource mobilization. Technological infusions will raise productivity; foreign capital can ease the trade-offs between investment and consumption. But ultimately states need to mobilize their own labor and

prioritize long-term growth over immediate needs. Borrowing is one way to raise the necessary funds, but to make that sustainable, you need a state that can tax as well as spend.

Beyond these basic elements of economics, anyone expounding general theories about either the miraculous benefits of investment or the inevitable pitfalls of foreign aid should be *prima facie* suspect. One thing is for sure: If you don't make a substantial commitment—and that is generally true for chronically underfunded development spending—don't expect large results. Far too often, Western aid is like a drop of water on a hot stove. And this is especially true where the boundary between saving lives and self-sustaining development is fluid and violent.

In recent years, there has been much wailing and gnashing of teeth over the question of how the West “lost the Sahel.” From 2017 onward, European countries helped launch more than a thousand projects as part of the so-called Sahel Alliance. The western Sahel at the time was home to about 100 million of the poorest people in the world, with the human development indices to match. Niger was long hailed as a bastion of Western influence. But before the 2023 coup, which overthrew the reforming government of Mohamed Bazoum, almost two-thirds of Niger's population could not read. Clearly, Niger desperately needed investment in education, irrigation, and basic health services. And aid did flow.

But on what scale? In the early 2020s, before the coup, Niger was receiving just under \$1.8 billion per year for a population of 25 million people. On a per capita basis, that came to \$71 per inhabitant, or \$1.37 per week, in 2021. Of this meager total, roughly 7 cents went to education, 15 cents to health, and 30 cents to production and infrastructure. Twenty-six cents were spent on the essentials necessary to keep the poorest alive.

So the obvious question is: How much bang would you expect for \$1.37 per week, split between the most urgent needs of survival and long-term investment? How much impact on a nation's education or health do you expect to achieve for a few cents? You shouldn't expect large effects from tiny means, or use the ineffectiveness of aid in boosting development as an excuse for cutting budgets, when you have barely even tried it.

To multiply public funds, the blended finance model relied on public-private partnerships, which brings us to the third dimension of aid and development—what might be called the global political economy. If you lend large amounts of money to high-risk, low-income countries, you should expect some of your loans to go bad. That is why they are called high-risk. That is why lenders can command high interest rates and demand assistance in de-risking from public lenders and development agencies in the global north. If things go wrong, creditors must be willing to take their losses and move on. It is what they signed up for.

If you don't make a substantial commitment, don't expect large results. Far too often, Western aid is like a drop of water on a hot stove.

Does China hope and expect that the realization of its agenda will help build friendly relations? Of course it does. Is this a global power play? Of course it is.

Yet again and again this is not what debt-restructuring processes deliver. Private creditors haggle for every conceivable concession and use U.S. and U.K. courts to back them up. Borrower nations are loath to push their case too strongly for fear of suffering devastating downgrades. And financial institutions such as the International Monetary Fund end up offering de facto bailouts to rich-country lenders by offering offsetting finance, allowing private creditors to exit with minimal losses. All the while financial centers in the West assist in local elites' corrupt pillaging and asset-stripping by enabling capital flight and offering banking anonymity.

All of these issues have been long discussed in development circles. Moving aggressively to push debt restructurings, picking capable partners, promoting domestic resource mobilization, and building fair and equitable national tax systems that shut loopholes for capital flight—these aren't calls for a grand "new order" or for some carbon-copy replacement of the SDGs.

Instead, what is needed is the willingness to engage in specific acts of "reordering"—to change, for instance, the way that U.K. courts close to the City of London can be used to defend bond holder interests; to address the acute distributional struggles that link debt negotiations to taxation in Kenya; or to reform cocoa pricing policy that diminishes the livelihoods of peasant farmers in Ghana and opens the door to widespread smuggling and corruption.

IF THE UNITED STATES ABSENTS ITSELF from acutely urgent funding for millions of people at risk of HIV/AIDS and malaria, there is nothing to stop other G-20 members or smaller countries with immense resources, such as Norway or Qatar, from stepping in to fill the gap. And there is nothing to stop them from looking for partners to work with, which above all means facing the question of China.

China is the world's greatest development success. On that basis, it has emerged as a lender and as a development power. At its high point in 2016-17, lending under the Belt and Road Initiative for a while matched that by the World Bank. Though Belt and Road subsequently slowed, China's strategic direction remains clear. The CCP believes that material transformation is the key to legitimacy and peace. The

phrase often repeated by the Chinese leadership, quoting from Xi, is that development is the "master key."

Xi's Global Development Initiative was China's answer to the SDGs. It was not an overall rejection, let alone a point-blank denunciation, but a rewriting so as to focus on just eight key areas, including poverty alleviation, food security, pandemic response and vaccines, development financing, climate change and green development, industrialization, the digital economy, and connectivity in the digital age, all under the sign of "results-oriented actions."

Does China hope and expect that the realization of this agenda will help build friendly relations? Of course it does. Is this a global power play? Of course it is. Does China want to haggle about human rights and elections? No, it doesn't. Would it rather avoid those issues? Of course.

These are what Xi likes to call "bottom lines," and there is little to be gained by Western liberals harping on such obvious differences. Working alongside China is not going to give you everything you want. Rather than hoping for the "everything bagel" of development, we need to figure out our own bottom lines.

We are not in a world in which the future is mapped either in terms of universal norms or brightly colored SDG targets and cute infographics. The more primal and urgent imperative driving development both at the individual and collective level is not so much the quest for rights but the will to power—power over resources, purchasing power, the ability to resist the influence of others, to have security but also, if possible, to assert one's own zone of control. Development in this sense is not just about ticking boxes and chasing targets; it is inherently and necessarily political and geopolitical.

The bland box-ticking vision of 2015 is no longer our world. But in its rejection of the shared U.N. agenda in the name of strident sovereignty, the United States is indulging in a politics of denunciation more becoming of a downtrodden developing country than a former unipolar hegemon. By contrast, China's blend of realpolitik with ideology and national interest cannot help but seem rational and balanced as well as being backed up by an unparalleled national record of development and huge resources.

Western liberalism may balk. But pretending there is no difference between the two superpowers is folly. If the rest of the West wants to both compete and cooperate with China over questions of global development, it will need to come up with its own, more practical and realistic alternative both to the SDGs and to Trumpian atavism. ■

ADAM TOOZE is a history professor at Columbia University and columnist at *FOREIGN POLICY*, where he co-hosts *Ones & Tooze*, FP's economics podcast. He is the author of the *Chartbook* newsletter.



DE-RISKING INTO OBLIVION

The scarcity of public finance is a political fiction.

BY DANIELA GABOR



United Nations summits typically unfold with a feverish intensity. Official delegates battle over every verb, dollar figure, and timeline in the outcome document. But there was little drama of multilateralism at the Fourth International Conference on Financing for Development (FFD4) this July in Seville, Spain. After the United States withdrew in June, delegates agreed on the final draft—the Seville Commitment—two weeks ahead of the actual meeting.

Still, the world gathered in Seville, in sweltering temperatures topping 100 degrees Fahrenheit, a not-too-subtle omen of the climate hell we were there to ostensibly avert. Around 6,000 corporate lobbyists (nearly half the attendees) swarmed plenary halls, peddling private capital for “investible development” while delegates from the global south pleaded for debt relief and climate finance.

A decade after its launch at the FFD conference in Addis Ababa, Ethiopia, the investible development paradigm remains the unshakable consensus. In Addis Ababa, the World Bank gave it a catchy slogan: “Billions to Trillions.” Billions in public money, be it development finance or local fiscal resources, could activate the power of private cash. Institutional investors alone had the trillions to finance transformative projects and should be enticed into investible development partnerships with the state.

I termed this paradigm the Wall Street Consensus, to capture the turn to development as an asset class while tracing the continuities from the Washington Consensus, the neoliberal paradigm that reigned during the golden age of U.S. hegemony in international development. The new consensus adopted financiers’ view of development: privately owned, for-profit projects with returns improved—in financiers’ jargon, “de-risked”—by public subsidies and favorable regulations. A new hospital or housing complex becomes investible once financiers such as BlackRock or Blackstone get concessional loans from the World Bank and local fiscal resources to guarantee a certain risk-adjusted return. The same investment demands apply to renewables, education, water, highways, or carbon and biodiversity credits.

In Seville, the rhetoric shifted away from “trillions.” Even the World Bank dropped it, humbled by evidence from the Organization for Economic Cooperation and Development

that every dollar of multilateral investment mobilized only about 30 cents of private investment. But the investible paradigm had bigger problems than the missing trillions. Financiers, touted as *the* new development partners, were in fact draining the global south rather than investing there. External debt distress loomed large, with debt-servicing costs for developing countries reaching an all-time high of \$1.4 trillion in 2023. Countries that were promised trillions in private investment were instead paying trillions in debt service to private creditors, often redirected from public spending on health and education.

Grappling with these realities, the Seville Commitment acknowledges the tension between investor returns and development outcomes. It notes that de-risking often skews benefits toward private investors, that governments and multilateral development banks have allowed investors to cherry-pick revenue-generating assets in middle-income countries (74 percent of blended finance still flows there), and that de-risking commitments have generated significant fiscal burdens and debt sustainability problems. These were significant concessions to the critics of investible development. “Private investors,” we heard in Seville, “should pay attention to development outcomes.”

How naive to appeal to investors’ morality when the first decade of investible development is littered with examples of aggressive profit maximization, from Meridian’s public-private partnership hospitals in Turkey to TPG’s hospitals in Kenya. Extractivism is the feature, not the bug, of investible development.

This was why the U.N. FFD4 expert commission I was a member of, set up by the Spanish government, proposed building state capacity to govern investible development. We suggested new institutions and metrics to measure, monitor, and, through conditionality, align “investible” projects with development outcomes; criteria for fiscally responsible

How naive to appeal to investors’ morality when the first decade of investible development is littered with examples of aggressive profit maximization.



Situation Report at UNGA



Reporters **JOHN HALTIWANGER** and **RISHI IYENGAR** will be on the ground at the 80th session of the U.N. General Assembly, covering breaking news and providing an inside look at one of the most consequential gatherings of the year.

ENJOY DAILY EDITIONS
SEPT. 22-26



SIGN UP AND READ FP'S COVERAGE AT
**FOREIGNPOLICY.COM/
UNGA**

de-risking, including ceilings on contingent liabilities; and de-risking debt rules to limit long-run fiscal costs.

We also advised developmental carve-outs that would ring-fence social infrastructure—such as health and education—from de-risked private ownership. A quick look at the U.S. “investible health” model is enough to understand what happens when the state surrenders welfare to private equity. Instead, some public goods should be delivered by the state. But the Seville Commitment ignores our proposals for ring-fencing and gestures vaguely toward “clear monitoring and accountability mechanisms” in de-risked projects without conditionalities for financiers.

In Seville, it became clear why the commitment was tough on diagnostics but weak on remedies. While debt campaigners debated principles, the de-riskers—lobbyists, finance ministries, multilateral banks, consultants, and financiers—were laser-focused on one goal: how to turbocharge private capital into development assets. The financiers attending the International Business Forum, held alongside FFD4, had no interest in development outcomes.

Their explanation for the “trillions failure” was that they had not received sufficient incentives. Their *compradores* in academia in one Seville panel joked about “de-risking our minds.” Perhaps an accurate quip for minds that speak the truth that power wants to hear, liberated from the risks of critical thinking.

BUT SEVILLE RAISED BIGGER QUESTIONS. Why has multilateralism converged again on a development paradigm that surrenders the state’s social contract to financiers while simultaneously weakening state capacity to pursue transformative change? And does the renewed Big Finance push for investible development really matter that much in a world of great-power competition, where another faction of capital, Big Tech, has occupied the White House and is driving the world faster toward climate disaster with its insatiable demand for energy and water? Is this the last, pathetically ineffective gasp of a moribund U.S. hegemony while China looms on the horizon?

First, investible development will remain the answer as long as the West pursues transformative economic visions while staying wedded to the macrofinancial politics of neoliberalism: the “monetary dominance” regime of independent central banks that Milton Friedman designed to constrain public financing after the Keynesian decades in which central banks were subordinated to their governments, as well as the surrender of the welfare state, particularly pensions, to institutional capital. Distracted by U.S. President Donald Trump’s chaotic trade policies, it’s easy forget that ours is now a world of competing transformative state projects.

It is not a coincidence that 2015 marked the turn toward transformative development; this was the same year that China announced its Made in China 2025 industrial policy agenda, aiming to make it the global leader in cleantech manufacturing. The competition accelerated with the Biden administration's resuscitation of industrial policy in the hope of countering the hegemonic threat posed by China's extraordinarily successful state-led transformation.

Like Bidenomics, investible development promises transformation through an "incremental upgrade" of the neoliberal state. It adds a thin layer of de-risking institutions (public-private partnership offices, development banks that take currency risk from investors, or country platforms such as the Just Energy Transition Partnerships). The de-risking state can decarbonize, develop, or industrialize cleanly without coercing capital and without radical institutional change. It can transform economies without transforming the state that neoliberalism created, a state where central banks control public money creation, leaving public financing a binary choice between higher taxes that threaten a capital strike and higher debt that exposes governments to the mercy of bond vigilantes.

When I pointed out in a Seville panel that, historically, successful transformative projects were financed through financial repression, capital controls, credit policy, and money printed by central banks (that is, monetary financing), I was met with polite smiles. The contemporary example, China, was dismissed as an exception for its vast scale.

Instead, we learned from a high-ranking U.N. official that central banks lobbied hard to be kept out of the Seville process. They were successful. The conference document examines the foreign and domestic, public and private resources that could finance development but does not consider even once the central bank, the key public institution that creates public money and governs the creation of private money. This invisibility is a political choice: It preserves the neoliberal design of central banks as enforcers of macroeconomic orthodoxy and guardians of a distributional status quo that benefits capital. Its consequences are not trivial.

For one, it weakens the state's transformative capacity. It leaves countries vulnerable to the whims, and lobbying power, of foreign investors, which in turn constrains

Like Bidenomics, investible development promises transformation through an "incremental upgrade" of the neoliberal state.

transformative public spending. To its credit, the Seville Commitment acknowledges the decades of illicit financial flows and tax injustice that benefited financiers, corporations, and the wealthy. But the final document dilutes initial commitments to a U.N. multilateral process on debt that would wrest deliberative control away from the closed-door clubs where financiers' lobbying might prevail.

Civil society activists offered concrete steps for an effective U.N. debt process: a multilateral sovereign debt resolution mechanism, binding responsible lending and borrowing principles, an automatic mechanism for debt relief in the wake of catastrophic external shocks, a global debt registry, and, critically, domestic legislation in creditor countries to mandate private creditor involvement in debt relief.

Some of these points made it into one paragraph of the document—but only in a weaker form because Canada, the European Union, Japan, South Korea, and the United Kingdom objected heavily. These handmaidens to Big Finance first tried to remove the paragraph altogether and then eventually accepted a diluted wording while also dissociating from that paragraph. ("Dissociation" allows countries to sign the FFD4 document without considering themselves bound by a particular paragraph. Only the U.K. in that list did not dissociate.) Notably, China did not dissociate, despite being regularly portrayed as the villain in debt renegotiation.

Finally, the hype around Big Tech and artificial intelligence has reinstated the veil that neoliberalism so successfully draped around Big Finance until the 2008 crisis. The Trump administration's gift to private equity—allowing it access to the \$9 trillion U.S. retirement plan market—barely raised an eyebrow. But try this thought experiment. What if, instead of giving the BlackRocks of this world more and more public subsidies to take over our public infrastructure, we reclaimed the trillions in workers' capital they manage? One bold move to generate trillions in public financing for development would be to nationalize pension funds. This alone would shrink private equity, along with the power of the asset managers that overshadowed Seville, by at least a third. If that sounds impossible, a 2018 International Labour Organization report titled "Reversing Pension Privatizations" shows that it is not.

The scarcity of public finance is a political fiction, maintained because it serves capital's veto power. The money exists. The institutions can be rebuilt. Only the will to reclaim them has been de-risked into oblivion. ■

DANIELA GABOR is a professor of economics at SOAS University of London and the author of the forthcoming book *The Wall Street Consensus*.



THE RISE—AND FALL—OF NGOS

From a '90s heyday to today's global crackdown.

BY SUPARNA CHAUDHRY

In just nine months, the Trump administration has laid waste to the development landscape, dismantling the U.S. Agency for International Development (USAID) and slashing nearly the entire U.S. foreign aid budget. This has posed a problem for nongovernmental organizations working on development the world over, derailing decades of work to increase access to health, food, education, and better governance. The impact is disproportionately felt across the global south, where these cuts will inevitably erode institutional knowledge and disrupt development trajectories.

But while the U.S. government's actions have posed the biggest and most unexpected challenge for these groups, the reality is that the heyday of NGO influence was already long over. NGO revenue streams have dried up—and not just from the United States. France, Germany, the Netherlands, Sweden, and the United Kingdom had already begun their aid retreat before U.S. President Donald Trump took office a second time. In 2020, the U.K. effectively closed its equivalent of USAID, the Department for International Development, by merging it with the Foreign Office. Foreign aid dropped by about \$6 billion after the merger, a decline expected to hit \$11 billion by 2027.

Similar trends are visible across Western Europe. Sweden, which previously was one of the top countries that provided the most development aid as a percentage of gross national income, more than halved its overseas aid budget in 2023. In Germany, overseas development assistance fell by over 10 percent from 2023 to 2024, with more cuts projected as the country prioritizes defense spending. Similarly, in 2025, France reduced its development aid budget by almost 40 percent, representing a reduction of nearly 2.3 billion euros (about \$2.6 billion). The Dutch government will cut 2.4 billion euros (\$2.8 billion) from its development aid budget by 2027, while Belgium has announced a 25 percent reduction in aid funding over the next five years.

Concurrently, global democratic recession and authoritarian resurgence have created a troubling environment for NGOs. In the face of fewer democratic constraints, these

governments are also eroding the norms that supported these groups for much of the late 20th and early 21st centuries.

As a result of these trends in tandem, many development NGOs have had to abruptly close programs and lay off staff. In Ethiopia, South Africa, and Uganda, many NGOs working on providing HIV/AIDS treatment, vaccinations, and maternal and child health care have laid off staff or closed entirely. In Somalia, Save the Children closed nutrition centers. In Honduras and other countries, cuts to food programs administered by Catholic Relief Services left children without daily meals. U.S. and U.K. aid cuts have especially decimated sexual and reproductive health programs for women and girls. What does the global war on NGOs mean for development? And with their decline, can private aid to NGOs fill the gaps for the world's poor?

FOLLOWING THE DISSOLUTION of the Soviet Union and the wave of democratic transitions across Latin America, Asia, and Eastern Europe, Western aid agencies channeled significant resources to NGOs in the 1980s and '90s. NGOs increased in number, size, and funds received and emerged as key actors in development, democratization, and humanitarianism. A coalition of NGOs, the International Campaign to Ban Landmines, played a key role in the adoption of the Anti-Personnel Mine Ban Convention in 1997. Their efforts won them the Nobel Peace Prize that same year. Médecins Sans Frontières won the prize shortly after, in 1999, in recognition of its pioneering humanitarian work. In 1997, Jessica Mathews, who that year would become president of the Carnegie Endowment for International Peace, described a “power shift,” in which NGOs became power brokers alongside governments in global politics.

These organizations in the development sector were seen as more competent and less prone to misuse and bureaucratic inefficiency than governments. In 1996, the United Nations started its Oil-for-Food program to allow Iraq to sell enough oil on the world market in exchange for food and medicine to soften the blow of sanctions after the first Gulf War. But Iraqi leader Saddam Hussein earned billions of dollars through corruption and illegal oil smuggling, furthering the notion that direct aid transfers to governments ran the risk of officials pocketing aid for themselves. Incidents such as this soured governments on direct transfers, and instead an increasing amount of foreign aid was

Left: A child carries water in a village east of Aweil, South Sudan, on March 6. The community was photographed for a story about the effect of the withdrawal of USAID and other support on the war-torn region.

channeled to development NGOs in an effort to alleviate global poverty, disease, and hunger. International NGOs also became important providers of humanitarian aid in the wake of ethnic conflict and genocide in the Balkans and Rwanda.

By the early 2000s, though, major NGOs began to struggle to operate at a larger scale while maintaining the grassroots contacts and input that contributed to their early successes. The growth of international NGOs raised concerns about how accountable these groups were to the communities they served, as locals felt excluded from agenda setting, implementation, and evaluation of NGO programs.

Others criticized the power dynamics inherent in their work, raising concerns that these groups might be replicating global hierarchies. Most international NGOs were headquartered in the global north, with influential development NGOs such as BRAC—headquartered in Bangladesh—being more of an exception rather than the norm. As a result, large NGOs could attract substantial funding, but this would draw funds away from local civic actors and needs. Following the 2010 earthquake in Haiti, the oversaturation of international NGOs in the country and the absence of any coordinating mechanism led these groups to duplicate one another's activities. Similar concerns were present in other natural disasters, where NGOs and the aid sector were seen as overwhelming the local response.

In response to these criticisms, NGOs undertook actions to establish and enhance their financial transparency, accountability, and responsiveness. Some reorganized with localization initiatives that gave decision-making powers to local communities. But governments around the world continued challenging NGOs' legitimacy. They argued that these groups were elitist and advanced foreign agendas and partisan political objections. Claims such as those made by former U.S. Secretary of State Colin Powell—who declared in 2001 that “NGOs are such a force multiplier for us”—did little to allay some foreign leaders' concerns about these groups as partisan.

The subsequent color revolutions increased these leaders' hostility toward NGOs. Russian President Vladimir Putin, for example, insists the West orchestrated protests and regime change in Georgia, Kyrgyzstan, and Ukraine through its support of local NGOs and activists. While scholarly work debates whether U.S. democracy assistance and support by U.S. NGOs played a prominent role in regime change in these countries, leaders in the region wasted no time in jumping to the conclusion that the West was using NGOs as political weapons. Claims such as these paved the way for the global crackdown on NGOs—and a perception of their overreach was embraced by leaders around the world. In 2016, then-Ecuadorian President Rafael Correa, for instance, argued that foreign governments were using NGOs to subvert democracy.

Today, more than 130 countries have cracked down on

In the face of fewer democratic constraints, governments are also eroding the norms that supported NGOs for much of the late 20th and early 21st centuries.

NGOs, many through administrative means. An administrative crackdown uses the law to create barriers to entry, funding, and advocacy. In 2012, the Russian government forced organizations receiving foreign funding and engaging in “political activities” to register as “foreign agents.” The designation subjected groups to onerous financial requirements and placed them under government monitoring. Similarly, in 2010, Indian lawmakers amended the Foreign Contribution (Regulation) Act (FCRA), enabling the government to target nonprofits of a “political nature.” Neither Russia nor India clearly defined “political.”

More recently, in 2024, despite public backlash, Georgia passed a law requiring NGOs to register as “pursuing the interests of a foreign power” if they received more than 20 percent of their funding from foreign sources. This April, the Georgian government introduced criminal penalties, including prison sentences, for individuals who refuse to register as foreign agents.

These laws' chilling effect is not limited to groups supporting human rights, media freedom, political advocacy, or promoting democracy. In India, the FCRA hampered many development NGOs' responses during the deadly delta variant wave of the COVID-19 pandemic because it prohibited subgranting funds from larger donors or international NGOs to grassroots organizations. It also imposed a 20 percent cap on administrative expenses drawn from foreign funds, inhibiting organizations' capacity to hire more staff during the emergency. When India's government did not renew Oxfam's license and registration in 2022, it impeded the supply of oxygen cylinders, ventilators, and food to vulnerable communities.

International actors, meanwhile, have struggled to mount a coherent campaign to stymie such repression. This was partly because even during the first Trump administration, the U.S. government had already started positioning NGOs as a cultural enemy. In June 2018, Nikki Haley, the U.S. ambassador to the U.N. at the time, blamed the U.S. withdrawal from the U.N. Human Rights Council on NGOs. Meanwhile, Western democracies such as Australia and Italy started criminalizing and restricting NGOs working with migrants. In New Zealand, Greenpeace lost its charitable status due

to its political activities, which was reinstated only after a High Court decision in its favor. In Canada, environmental NGOs, particularly those opposing proposed oil pipelines, faced increased prosecution. Authoritarian governments were no longer the only ones restricting NGOs. Democracies, fearful of these groups challenging their economic interests and questioning their development and industrialization policies, also began pushing back.

As a result, discourse around NGOs has dramatically shifted from the optimism of the 1990s. This July, U.S. Secretary of State Marco Rubio referred to the “globe-spanning NGO industrial complex” that, in his estimation, had little to show since the end of the Cold War. And following the change in the foreign-policy priorities of major Western powers, development NGOs face even greater challenges. Overseas development assistance by top donor countries in the Organization for Economic Cooperation and Development fell by more than 7 percent in 2024. Some governments retreated due to strategic realignments that prioritized national interests such as defense spending over foreign aid. Others did so due to fiscal pressures and budget deficits. In response to dramatic cuts to development aid, private funders have stepped up. But will these new actors be able to ensure that NGOs’ programming continues without further cuts? And what does it mean for the development sector if NGOs are simultaneously losing access to state funds and support and becoming increasingly reliant on nonstate actors?

IN THE UNITED STATES, several groups, including the Mellon, Skoll, and MacArthur foundations, pledged to fill the gap created by the loss of foreign aid in March and April. Others shored up emergency support and bridge funds to prevent disruption to the work of front-line organizations. However, the funds pledged by these foundations were a fraction of the U.S. foreign aid budget—to the tune of millions, vastly below the typical annual budget of USAID of some \$40 billion.

Foundations and elite philanthropy are not the only sources of funds for these NGOs. Individual charitable giving may also have the potential to keep these organizations afloat. My research indicates that for individuals who already donate to nonprofits, learning about repressive NGO environments increases their generosity. In addition,

The current foreign aid retreat leaves the door open for China, which already provides development assistance through its Belt and Road Initiative.

individuals who frequently volunteer and trust institutions are more likely to maintain their support for international NGOs that face criticism or crackdown abroad. Further, my experimental study with Marc Dotson and Andrew Heiss shows that in the face of legal crackdowns and government efforts to malign NGOs, specific actions by these groups can prevent reductions in support from individual donors, with NGOs perceived as being financially transparent and accountable receiving continued support from individuals abroad.

Though the short-term response by foundations and the research findings on individual charitable giving may be promising, development aid previously given by multiple major global economies may not be easily replaceable by other sources. Official development assistance provided by the United States usually amounted to more than \$60 billion annually. The Foreign Aid Bridge Fund has already concluded, with doubts about raising significant amounts of additional capital. And according to the latest Global Philanthropy Tracker report, 32 high-income countries contributed to more than \$70 billion in cross-border philanthropy in 2020. While this rivals the amount of U.S. aid, coordinating these funds from so many countries would be a herculean task, and it’s unclear what organization would assume that role. Private aid will also be unable to replace the expertise, scale, or agenda-setting capacity that came with government aid.

In response to previous disruptions in aid (especially through the U.S. global gag rule, which prevents foreign NGOs that provide legal abortion services or referrals from receiving aid), NGOs have reached out to geopolitical rivals to avoid disruptions to their operations. The current foreign aid retreat leaves the door open for China, which already provides development assistance through its Belt and Road Initiative. However, China usually sidesteps NGOs, instead cultivating close relationships with foreign governments as a way to promote China’s own governance norms, including emphasizing state sovereignty.

If the era of NGOs is indeed coming to an end, the effects will be devastating for vulnerable communities, particularly in the global south. Many countries, especially non-democracies, had often tolerated development NGOs because of the services they provided. Increasing anti-NGO rhetoric on both the left and right, and Western donor governments scaling back on aid, means that development NGOs may face an even narrower civic space. Repressive governments may become even more emboldened to enact restrictive laws—ones that undermine advocacy and development NGOs alike. ■

SUPARNA CHAUDHRY is an associate professor of international affairs at Lewis & Clark and the author of the forthcoming book *Civil Societies, Uncivil States: State Repression of NGOs*.

THE DEVELOPMENT ECONOMIST WHO WASN'T

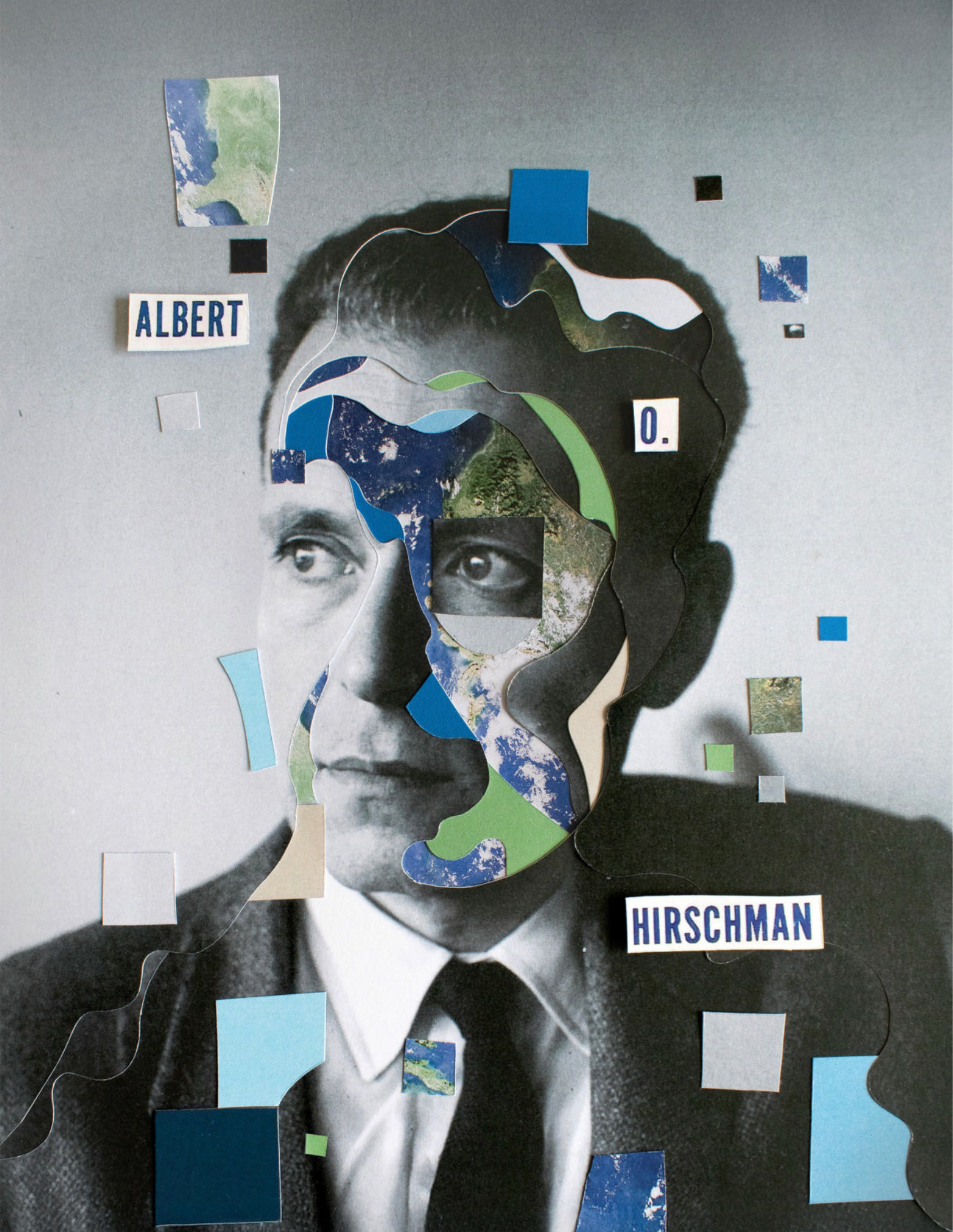
*Once dismissed from the field he helped found,
Albert O. Hirschman feels newly relevant.*

BY DANIEL W. DREZNER

THE HISTORY OF DEVELOPMENT ECONOMICS, since its inception, has been one of fads and intellectual bubbles. For decades, the U.S. government and international financial institutions have glommed on to a singular recipe for economic development, convinced that their latest, greatest idea would work. These have included the “Big Push” of massive public and private goods investments back in the 1960s and the neoliberal Washington Consensus that dominated post-Cold War thinking.

The terms used to describe the poorer countries of the world have also changed, from the Third World to emerging markets to the global south. But the faith among development economists that One Economics Recipe Will Rule Them All has persisted.

In the post-neoliberal moment of 2025, perhaps some epistemic humility is called for in the economics profession. There is now an elite consensus that the neoliberal model of economic development was far too cookie-cutter in its approach—but not much agreement on what comes next.



ALBERT

0.

HIRSCHMAN

Perhaps then, the moment has come to return to a more contextual, country-specific approach. Harvard University economist Dani Rodrik has been a longtime fan of this concept, blasting development “big think,” arguing in 2007, “The best-designed policies are always contingent on local conditions, making use of preexisting advantages and seeking to overcome domestic constraints. That is why successful reforms often do not travel well.”

Rodrik has advocated for a return to the ideas of Albert O. Hirschman, one of the founders of development economics and the author of *The Strategy of Economic Development*, published in 1958. While Hirschman is celebrated for his myriad contributions to the social sciences, his ideas about development economics fell out of favor decades ago. Just before the 2008 financial crisis, Rodrik suggested that this was a mistake: “Hirschman looks less and less the maverick that he fancied himself to be. Conventional wisdom may finally be catching up with him.”

That assessment may have been premature in 2007, but in 2025, it seems trenchant. Hirschman was a big believer in eclecticism in development projects—an idea that resonates with recent social science trends acknowledging the role of complexity. Is it time for a Hirschmanesque approach to economic development? There are reasons to be optimistic—and also reasons to be skeptical.

WHILE HIRSCHMAN HAS BEEN CELEBRATED in the public sphere, the economics profession holds a somewhat more muted view. As one critical assessment noted in 2022, Hirschman has long been “the noneconomists’ favorite economist. ... He was not a model builder in a profession of model building. He was not a statistician in a world where numbers mattered.” It is not a coincidence that Hirschman’s most widely cited works are not about development economics. His most famous book, *Exit, Voice, and Loyalty*, is a brilliant exegesis of how nonmarket tactics can pressure large organizations.

More than 30 years ago, economist Paul Krugman provided an intellectual epitaph to Hirschman’s legacy in development economics, explaining that “while I am a great admirer of *The Strategy of Economic Development*, I do not think that it was helpful to development economics.” Even more intellectually supportive assessments acknowledge, as the University of Denver’s Ilene Grabel did in 2018, that “Hirschman flouted what would become central norms in the social sciences.” Multiple scholars have noted that there is no such thing as a Hirschmanesque school of thought in development economics.

Nonetheless, there are valid reasons for asking whether another look at Hirschman’s approach to economic development is warranted. In his work, he rejected the universalism of the neoliberal consensus—an approach that suggested

a radically reduced state role and a prioritization of letting global markets guide resource allocation. He also spurned the grand designs of the Big Push school, which advocated an extremely balanced, finely calibrated surge of investment across every major economic sector.

His approach toward economic development rested on a few key tenets. The first was that, like economist Friedrich von Hayek, Hirschman posited that information was always partial and all policymaking interventions had unanticipated effects. In other words, Hirschman was leery of sweeping policy interventions because he believed it was impossible to anticipate every second-order and third-order effect.

Second, in contrast to the Big Push approach that stressed a precise sequencing of external investments, Hirschman embraced the notion that growth was always unbalanced and that there was no a priori proper sequence for underdeveloped nations to become developed. He believed that development would apply pressure on forward and backward linkages and the bottlenecks in those linkages would create sufficient pressure for additional policy reforms.

Hirschman embraced strategic focus by policymakers on sectoral targets of opportunity and localism and eclecticism in their approaches to development. These are concepts that successors such as Rodrik have been advocating in this century as well. As the intellectual sheen of neoliberalism has worn off and even developed great powers embrace industrial policies, maybe Hirschman really is the answer for 2025.

Except—and with Hirschman, there is always an “except”—it is impossible for anyone who writes a book with the title *A Propensity to Self-Subversion* to be full-throated in support of any singular development approach. Hirschman was sufficiently dialectical in his approach, with a bevy of feedback loops and recursive processes, such that any singular development approach always runs into new geoeconomic dangers.

The highlights of Hirschman’s oeuvre offer a cautionary warning against believing that even an eclectic approach to economic development will be terribly successful.

HIRSCHMAN’S FIRST BOOK—*National Power and the Structure of Foreign Trade* (1945)—has become newly relevant again. Generalizing from Nazi Germany’s strategy of inculcating asymmetric dependence in Eastern European countries during the Great Depression, Hirschman stressed the conscious creation of “conditions which make the interruption of trade of much graver concern to its trading partners than to itself.” In other words, Hirschman warned that smaller and less developed economies could be vulnerable to asymmetric dependence from a larger economy. One way this could happen was through the “exclusive complementarity”

of global production chains. Another mechanism was that expanded trade would lead to the creation of a “commercial fifth column” of interest groups inculcated within the targeted countries that would have a vested interest in not alienating the trade partner.

In thinking through the precise methods through which states could enhance their national power through foreign trade, Hirschman concluded that the larger economy’s pursuit of national power did not necessarily sacrifice the pursuit of national plenty. For smaller and weaker economies, however, the dangers of asymmetric dependence were very real.

Many of these ideas are now considered vogue again, as discussions of economic statecraft, weaponized interdependence, and geoeconomics dominate the study of global political economy. The implications for economic development, however, are underappreciated. While Hirschman was far from being a devout free-trader, he did believe that trade was a vital ingredient for fostering rapid economic growth.

Unfortunately, the international system is shifting to a structure in which the largest markets are perfectly willing to use their economic power to establish market dominance and pressure smaller countries into making policy concessions. China has been doing this for decades in promoting its positions on Taiwan and human rights. Beijing’s dominance in green technology and the processing of critical minerals implies that any country aspiring to economic growth must manage its dependence on China.

Meanwhile, the first months of Donald Trump’s second term have been an exercise in the president trying to use U.S. economic leverage to extract a variety of economic and political concessions from allied countries. Some countries, such as Brazil, have demonstrated sufficient economic strength to resist. Others, however, have had little choice but to fashion a framework bargain with the Trump administration. For these countries, their reliance on the United States as a security and economic partner has undermined their bargaining position.

This cautionary tale of weaponized interdependence will make export-oriented growth strategies—or even strategies that require strategic inputs—far less viable for the near future. As Hirschman warned, geopolitics can trump market economics, narrowing the pathway to economic development.

AT THE SAME TIME, the intellectual shift away from economic openness has undermined noneconomic motivations for relying on global markets. Hirschman’s *The Passions and the Interests* (1977) challenged sociologist Max Weber’s well-known assertion that capitalism emerged out of a Calvinistic search for salvation. Hirschman noted that key thinkers viewed capitalism as a means through which violent tendencies

in man and society could be tamed through the expansion of commercial activity. In other words, Hirschman argued that prior to Adam Smith, many philosophers believed that trade would tame man’s passions and let him focus on his material interests.

This belief has persisted long after Smith as well. International relations thinkers including Immanuel Kant, Norman Angell, Joseph S. Nye Jr., and Francis Fukuyama have argued that complex economic interdependence could act as a brake on conflict escalation. International relations scholarship has been supportive of this position. Nor has this been a purely intellectual argument: Policymakers including Cordell Hull, Jacques Delors, and Bill Clinton believed in the commercial peace as well.

But for many, the post-Cold War era represents a falsification of this worldview. Despite the depth of the Sino-American economic relationship, tensions between the two countries rose as China’s power increased. The European Union consciously pursued a strategy of engaging with Russia as a means of pacifying it: Ask Georgia and Ukraine how well that has worked out.

The decline of faith in the commercial peace has serious implications for economic development. During the neo-liberal era, economic policy and foreign policy were symbiotic; embracing an open economy could make an economy safer and more prosperous. In 2025, that symbiosis seems to have collapsed. Unfortunately, the confident, optimistic claims of Montesquieu or James Steuart recounted by Hirschman in *The Passions and the Interests* have not been borne out. A world of increasing autarky is one that limits development choices for all policymakers.

Wrestling with Hirschman’s ideas is always a struggle to find insight from occasionally contradictory sets of ideas. It is understandable why some have turned to Hirschman as neoliberalism’s fortunes have faded. As a scholar who resolutely believed that paradigms were a hindrance to understanding, Hirschman would have approved of a more heterogeneous policy environment for economic development.

While the current moment might fit with Hirschman’s embrace of eclecticism, it lacks an essential Hirschmanesque ingredient: optimism about what can be achieved. Unfortunately, the belief that weaponized dependence is pervasive puts severe constraints on economic development strategies. In other words, Hirschman’s entire corpus of work offers a warning about the constraints on his recipe for economic development. ■

DANIEL W. DREZNER is an academic dean and a distinguished professor of international politics at Tufts University’s Fletcher School. He is the author of the *Drezner’s World* newsletter.



FOREIGN AID AS SELF-HELP

*South-south cooperation, and its vexed
history, is back on the agenda.*

BY
DAVID C.
ENGERMAN



Amid so many other United Nations events this September, headlined by the procession of national leaders addressing the General Assembly, it would be easy to miss the celebration of the U.N. Day for South-South Cooperation on Sept. 12. Slotted inconveniently late on a Friday afternoon—well before most world leaders arrive the following week—the event will mark the 47th anniversary of the adoption of the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation Among Developing Countries (mercifully shortened to BAPA).

The U.N. celebration is just one example of the growing calls for a renewal of south-south cooperation, the tradition of developing countries relying less on the industrialized world than themselves for their path to material progress. But are these renewed calls up to the task of charting a new path through the current crisis in international development?

The situation for traditional development looks bleak. The spectacular destruction of the U.S. Agency for International Development (USAID), the largest (and depending on definitions the oldest) bilateral aid organization in the world, captured headlines this year, but other warning signs about bilateral aid abound. Even stalwart agencies in countries such as the United Kingdom and the Netherlands have instituted significant cuts in bilateral assistance.

The consulting firm McKinsey and Co. estimates that the new steady state could easily end with aid up to 22 percent below current levels; it calls this a “generational shift” that goes well beyond the cruelty-by-design efforts of the Trump administration. In such an environment, encouraging poorer countries to engage in collective self-help seems one of the few avenues still open. But is it enough?

Over its many decades, south-south cooperation has blossomed in moments of crisis. It came into being, and has persisted, as an idealist movement born of harsh realities. With faint echoes for calls to revolution—“Poor countries of the world, unite! You have nothing to lose but your chains”—proponents hoped that building solidarity and self-reliance could protect them from the apathy (or even antipathy) of the global north as well as from global economic headwinds. In such settings, cooperation within the global south functioned as a consolation prize—and a potent symbol of the distance between the global south’s

aspirations and its options. This may well be the case for present-day south-south cooperation efforts.

CALLS FOR COOPERATION OF THE HAVE-NOTS date back at least to the 1920s, decades before the term “global south” came into common usage. Anti-colonial activists found common cause, and the Soviet-supported League Against Imperialism and Colonial Oppression brought together leading nationalists from Europe’s colonies. And South Asian lawyers crisscrossed the British Empire helping to promote rights for colonial subjects. These efforts focused on advocacy and politics—namely independence—though many interwar activists denounced the economic exploitation that defined colonial rule. The final declaration of the Asian-African Conference in Bandung, Indonesia, in 1955 opened with a 12-point plan for expanding economic cooperation among participating states.

Talk of international economic cooperation in the decade after World War II came amid a flush of optimism. Political independence, the argument went, would help bring prosperity to impoverished former colonies. Yet the optimism of these early years dissipated as the difficulties of achieving sustained economic growth became apparent. Sure, U.S. President John F. Kennedy got the United Nations to call the 1960s the “Development Decade,” but this wasn’t backed up by substantial U.N. funding. And improved marketing did not translate into improved economic conditions. By the end of the decade, a slew of books and articles referred to one or another crisis in development.

These unfavorable conditions spurred new efforts to build global south unity. By the time Secretary-General Raúl Prebisch inaugurated the U.N. Conference on Trade and Development (UNCTAD) in 1964, talk about solidarity among poorer countries swirled about many international venues. The first UNCTAD session gave birth to the Group of 77 developing countries, which put economics front and center; others, such as the Non-Aligned Movement, focused more on geopolitics. Observers pinned high hopes on these new organizations; one declaration called the creation of the G-77 an “event of historic significance.”

Yet these efforts did little to counter the increasing headwinds for international development. By the early 1970s, growing Western aid fatigue led to stagnant, or even

declining, levels of assistance. While the World Bank expanded the scope of its work in this period, the fact that it only offered financing, not grants, meant that recipient (i.e., borrowing) nations were on the hook for loans even as crisis conditions prevailed in the world economy. And the early 1970s were rife with such crises, most notably the four-fold spike in oil prices in during the 1973 Arab oil embargo.

Optimistic leaders in what was then called the “Third World” pointed to the oil embargo as a demonstration of the power of the have-nots, the global south flexing its economic muscles. But other cartels could not match OPEC’s impact. An agreement for cocoa launched by UNCTAD, for instance, never managed to shape commodity markets, let alone spark a global crisis. Much to the chagrin of Cadbury and Hershey’s, not to mention Ghanian farmers, chocolate did not fuel the international economy.

This misreading of the economic power of the global south also gave momentum to calls for a new international economic order (NIEO). After the International Monetary Fund (IMF) rebuffed proposals to democratize international finance, the G-77 agitated instead for the NIEO in a more sympathetic venue: the U.N. General Assembly. While the voting structure of the World Bank and the IMF limited the influence of poorer nations, the global south had a substantial majority in the General Assembly, with its one-country, one-vote principle. Thus, the NIEO resolutions passed easily on May 1, 1974. The NIEO marked the high tide of Third World idealism, with these countries hoping to convert numerical strength into economic and political power through solidarity and increased economic connections.

The NIEO was not the only attempt to draw political capital from the muscle-flexing of OPEC’s Arab members. Take the efforts of Rehman Sobhan, a University of Cambridge-trained economist who spent the 1960s agitating for the autonomy of East Pakistan, the more populous but less powerful portion of the bifurcated Pakistani state. When this movement culminated in the creation of Bangladesh in 1971, Sobhan spent much of the next decade trying to rebuild (in fact, just build) the Bangladeshi economy. He called on OPEC to serve as a counterweight to Western aid, a task made all the more urgent by U.S. National Security Advisor Henry Kissinger’s infamous endorsement of Bangladesh as a “basket case” in December 1971.

Sobhan looked on with satisfaction when OPEC established a special fund for development purposes after the price spike. In its first year, it loaned more than \$400 million to Third World countries. This figure, though, needs to be seen in light of the oil states’ \$70 billion windfall from oil prices in 1974 alone. Sobhan, well aware of this calculation, praised OPEC support as a political benefit even if it offered little concrete aid to Bangladesh. Ultimately, though, even Sobhan had to

With faint echoes for calls to revolution, proponents of global south unity hoped that building self-reliance could protect them from the apathy of the global north.

concede that the cartel was not likely to “underwrite collective self-reliance” of the global south “on the wings of Third World rhetoric.” Idealism would not be enough.

Though Third World rhetoric alone could not bring about Third World solidarity or self-reliance, it did at least pave the way for the creation of the U.N. Office for South-South Cooperation. The body’s founding resolution contended that poorer countries needed to unite to achieve their political and economic goals. The push for such cooperation, then, came out of the tumult of the early 1970s and, much like the NIEO before it, saw unity as a tool to mitigate the effects of global economic crisis.

The next burst of activity for south-south cooperation came about a decade later, at the end of the 1980s. For Africa and Latin America alike, the era of Ronald Reagan, Margaret Thatcher, and structural adjustment was a “lost decade.” Having accumulated debts well beyond their ability to repay, leaders in the global south were put through their paces by the World Bank and IMF. Under the rubric of structural adjustment, both organizations offered financing—but with strings attached: demands for fiscal austerity, privatization, and openness to international trade and investment. Even those economists in the global south who favored such policies chafed at the strict conditions and tight surveillance that accompanied structural adjustment.

As had happened a dozen years earlier, deteriorating economic conditions led to renewed calls for south-south cooperation. Socialist Julius Nyerere, the founding leader of independent Tanzania, spent the mid-1980s drumming up support for a “South-South Commission”—a name quickly streamlined by dropping the first “south”; its purpose was to build solidarity and self-reliance across the global south. Even some South Commission leaders wondered whether south-south cooperation could produce results when most members were in the same boat: commodity exporters seeking to industrialize. But such doubts did little to tone down the enthusiasm for south-south cooperation, which once again blossomed when poorer countries faced inauspicious conditions.

During the 1980s and ’90s, as the center of gravity of development assistance shifted from infrastructure loans to sup-



U.N. Secretary-General Ban Ki-moon dances with Guarani Indigenous women during a visit to Bolivia on June 13, 2014, ahead of the G-77+China summit.

port for economic reforms (i.e., liberalization), south-south cooperation adapted. Regional trade blocs appeared across the global south, uniting neighbors in an approach modeled on the European Economic Community (now European Union) and the North American Free Trade Agreement. Such efforts in South America, southern Africa, and Southeast Asia have successfully expanded trade relations among neighbors. But this was a new kind of south-south relation; instead of working primarily between governments, new economic relationships took place within global markets.

Yet the idealistic aims survived this transformation, as supporters of south-south cooperation continued along familiar lines. In the 1990s, the U.N. and the Organization of American States each created a fund for cooperation; funding for these new efforts, though, paled in comparison with bilateral aid as well as development lending from the World Bank and the proliferating regional development banks. Hoping to chart the future of south-south cooperation, the U.N. office called for a global summit to take place in 1996. Yet the future arrived long before the summit, which took place only in 2019—an index of the U.N. office’s limits.

WHAT DOES THIS NOT-SO-ANCIENT HISTORY suggest about the future of south-south cooperation as we enter the second quarter of the 21st century? If historical patterns hold, renewed excitement about south-south cooperation in the 2020s is an important signal—a signal of distress.

Even as many once poor nations have graduated (at least

If historical patterns hold, renewed excitement about south-south cooperation in the 2020s is an important signal—a signal of distress.

in the World Bank’s reckoning) into lower-middle-income status, there are plenty of reasons for pessimism. Long before the gutting of USAID, international development was in crisis. Progress toward the Millennium Development Goals swooned in the 2010s until they were replaced in 2015 by the Sustainable Development Goals, or SDGs, a set of concepts so broad that they can’t be contained on a single webpage. Recent indicators give little reason to hope that the SDGs will surpass the record of their predecessors. The 2025 SDG progress report estimates that about 10 percent of the world’s population now lives in extreme poverty, a number not forecast to shrink significantly in the next five years. Dreams of a “world without poverty” by 2030 seem all the more unattainable today.

Even when the SDGs were brand-new (and the distance to 2030 was greater), those who sought to empower the global south still had their doubts. Take Branslav Gosovic, a Yugoslav radical who held senior posts at the South Commission and in the U.N. In 2016, when the SDGs were still in their infancy, he called for a “resurgence of South-South cooperation.” Yet even he had to concede its limits:

... in terms of conceptualisation, declarations, blueprints, plans of action, initiatives and political enthusiasm for South-South cooperation, the record has been more than satisfactory. Many of these ideas, however, have remained in the realm of declaration and failed to result in expected action and tangible advances.

Two years later, Gosovic offered a comprehensive plan for the future of south-south cooperation—before admitting that it differed little from the failed attempts of the past.

So has south-south cooperation run its course? Sobhan doesn’t think so. Sobhan, like Gosovic a preternatural optimist, has sung the praises of south-south cooperation for



FP
China
Brief

A weekly digest of the stories you should be following from Beijing, plus exclusive analysis from FP's James Palmer.



SIGN UP FOR THE NEWSLETTER AT
[FOREIGNPOLICY.COM/CHINABRIEF](https://foreignpolicy.com/chinabrief)

more than four decades; he has long seen it as a key instrument to break the economic dominance of the West.

Yet the cooperation he praises today is buttressed not by political calculations or “Third World rhetoric” but by statistics on trade and investment flows among and between the poorer nations. South-south cooperation has succeeded, he told me in July, not through diplomacy or the official organs of south-south cooperation—but instead through the rise of China and the structural changes in global economic and finance that have made Asia the leading source of merchandise trade, investment funds, and technology transfer. When I asked him to compare the present state of cooperation to the past, he observed that while working to make OPEC an instrument of global south cooperation, he worked “at the governmental level.” Since the 1990s, he said, economic cooperation “has largely taken place through the global market.”

If south-south cooperation aimed only to build economic ties around the world that did not revolve around or go through the West, then mission accomplished. The rise of China and the increasing flows of capital, goods, technologies, and workers have created a far more global economy than most proponents might have imagined a few decades ago—so global, in fact, that U.S. President Donald Trump is trying to put the globalization genie back in the bottle.

But are global trade and investment the only measures of success for south-south cooperation? What of the decades-old hopes of Gosovic, not to mention Sobhan, that emphasized southern solidarity, trying to bring the world’s have-nots together in a community of interest—indeed, into a community full stop? The economic integration of the global south has succeeded well beyond what its most ardent supporters might have dreamed. But this isn’t necessarily the same as cooperation, as solidarity, as becoming a unified political force. As new formations of solidarity come and go—such as BRICS—poorer countries are building ever deeper economic and financial ties with one another. What decades of idealistic declarations couldn’t do, global markets did.

Or did they? On the heels of the rise of China and the arrival of what the U.N. office called the “locomotives” of the global south, economic integration has advanced markedly, transforming global economic structures. For their part, poorer countries are more integrated but not necessarily more united. Integration ultimately comes at the cost of the dreams of solidarity that animated the early proponents of south-south cooperation. ■

DAVID C. ENGERMAN is a professor of history and global affairs at Yale University and the author of, most recently, *Apostles of Development: Six Economists and the World They Made*.



CHINA'S LENDING HAND

*Both the party and the public are reluctant to follow
Washington's model of foreign assistance.*

BY HENRY TUGENDHAT AND JAMES PALMER

S

ince the Trump administration began to dismantle the U.S. Agency for International Development (USAID), many commentators have seen an opportunity for China. They argue that Beijing will “fill the void” left by Washington and is “cheering” the destruction of the agency. Fear of China supplanting U.S. foreign aid has been a growing concern among U.S. analysts for years, and China has already replaced U.S. projects in a few countries.

But it won’t be easy for Beijing to step into Washington’s shoes, both due to the scale of U.S. assistance and the level of domestic opposition that the idea of increasing foreign aid engenders in China. The Chinese Communist Party (CCP) and the Chinese public are both resistant to the idea, and there is little appetite for Beijing to replace U.S. projects as big as PEPFAR, the global HIV/AIDS initiative, or the roughly \$2 billion in annual food assistance that USAID provided around the world.

Chinese foreign aid currently totals between \$5 billion and \$8 billion per year, compared with the United States’ more than \$60 billion before President Donald Trump’s second term. As Yun Sun, an expert on Chinese foreign policy, has documented, assistance to Africa and other regions has met with criticism in the Chinese public sphere. The Chinese public often sees domestic needs as a higher priority and worries that money spent abroad is wasted. In response, Chinese bloggers seeking to justify the CCP’s commitments will sometimes point to opportunities created for China’s poorer regions. But perhaps more tellingly, the *Global Times*, a nationalist tabloid owned by the CCP, has argued that the benefits of foreign aid cannot be openly discussed due to public skepticism.

Part of this reluctance is because of China’s own development position: Despite the country’s economic rise to upper-middle-income status, its per capita income remains roughly one-seventh that of the United States. Chinese President Xi Jinping has emphasized eradicating poverty at home, but large swaths of the countryside and many urban migrants still live in impoverished conditions. That fuels public calls for a focus on domestic problems first.

China’s leadership is also careful to avoid the terminology of “aid” or “donor.” Officially, Xi has said China “will always remain a member of [the] developing countries,” and China maintains its developing nation status within the World Trade

Organization. Rather than presenting the country as a donor, official Chinese documents describe international aid activities as a form of “south-south cooperation.” All this has led the Chinese public to wonder why they should provide aid to foreigners when many people in China are still struggling.

Xi himself may need to be convinced of the political value of increasing aid. The Chinese leader has frequently criticized so-called welfarism at home, echoing a common conviction among the Chinese elite that too much government assistance creates laziness and dependence. Xi has argued that in the past, some Latin American countries became overly dependent on welfare, leaving them in a “middle-income trap.” Foreign aid is sometimes framed by Xi and other Chinese leaders as creating similar problems, using language originating in the West and even adopted by the Trump administration, such as “trade, not aid.”

China hasn’t always been so stingy. In the early 1970s, the country was a generous provider of foreign aid, proportional to the size of its economy, offering assistance equivalent to an astonishing 5.88 percent of its GDP, compared with just 0.04 percent today. Within the communist world, China sought to establish primacy over its then-main geopolitical rival, the Soviet Union. In a country still enthusiastic about the idea of revolution, much of this aid supported anti-colonial movements and socialist partners, although it also included some grand projects, such as the Tanzania-Zambia railway. Beijing’s direct rivalry with Moscow also meant that the two competed to help ideologically sympathetic governments, each hoping to win them over to its side of the geopolitical split.

However, by the end of the 1970s, China had radically rethought its foreign aid engagements. In the run-up to its so-called reform and opening-up period, China’s average

China has offered to replace a few small USAID programs—but so far largely in countries where Beijing has existing ties with the government or an immediate strategic interest.



Afghan children stand outside a China-donated tent at a refugee camp in Kabul on Aug. 17.

foreign aid expenditure dropped by 55 percent between the five-year plan periods of 1971-75 and 1976-80. This shift was driven by the unsustainability of focusing so much capital overseas when the domestic economy needed serious repair after the Cultural Revolution ended in 1976 and a recognition that tensions with the Soviet Union were easing. But later, as Western countries shunned China after the 1989 Tiananmen Square massacre, its government pivoted to reengage with much of the global south.

Instead of aid, Beijing began to prioritize the trade finance that has dominated Chinese engagements ever since. This prioritization of trade finance occurred soon after the development of coastal manufacturing in the 1980s and early 1990s. Ever since its establishment in 1994, the Export-Import Bank of China has issued more loans than any other Chinese bank to foreign buyers of Chinese goods and services. These loans could cover infrastructure, vehicles, telecommunications equipment, and much more.

Indeed, a common misconception by analysts has been to define Chinese export credits and preferential loans to foreign governments and institutions as “development finance,” perhaps because much of it (although certainly not all of it) is flowing to developing countries. Though some Chinese loans were concessional enough to be recognized as foreign assistance under Organization for Economic Cooperation and Development definitions, the reality is that many of them were commercial—as has been documented for some time.

Nor are China’s commercial lending practices anything unusual. There are roughly 120 export credit agencies around the world, most of which were created long before China’s began operations. What is unusual is the scale. Where the United States had outstanding export credits worth a little over \$6 billion in 2024 and Japan had stocks of export credit debt worth around \$7 billion in 2023 (the most recent fiscal year with data available), China’s outstanding buyer’s credit debts were worth nearly \$16 billion in 2024. But China also

had outstanding export credits worth \$134 billion last year listed as “international cooperation loans.” It is likely that these debts also functioned as buyer’s credits, but China’s Exim Bank does not define these financial products clearly enough to say so categorically.

China has offered to replace a few small USAID programs in recent months but so far largely in countries where Beijing has extensive existing ties with the government or an immediate strategic interest. In Cambodia, China has given \$4.4 million to assist a demining program that the United States briefly abandoned in January. (The Trump administration subsequently issued a waiver in February to keep funding the program.) That pales beside the billions of dollars provided in trade finance to Cambodia. In Nepal, China has reportedly offered to replace U.S. assistance, but details are scant. Nepal’s proximity to China’s disputed border with India also makes it especially central to Beijing’s Himalayan strategy.

And in February, after the United States drew down its commitments to the Africa Centres for Disease Control and Prevention from \$500 million to \$385 million, China joined forces with South Korea to offer \$4 million. In this case, it looked more like an opportunistic grab for headlines than a meaningful attempt to replace what was lost.

As such, fearing that China will fill the gap left by U.S. foreign assistance may miss the point. Beijing is aware of the rapid change in the international world order. It will seize political opportunities where possible, but it does not seek to simply copy Washington’s soft-power blueprint on the global stage. China’s leadership likely sees foreign assistance the same way as Trump’s team does, albeit for its own reasons. ■

HENRY TUGENDHAT is a research associate at the China Africa Research Initiative at Johns Hopkins University’s School of Advanced International Studies, and **JAMES PALMER** is a deputy editor at FOREIGN POLICY.

THE WORLD NEEDS AFRICA

*Governments, civil society,
and the private sector are
redefining the terms
of partnership.*

BY NDIDI
OKONKWO NWUNELI

64





Sisters Mwanahamisi Hasheem (sitting), 18, and Najma Hasheem, 26, work at a sewing shop in Matipwill village, Tanzania, on Jan. 23.

It has been 140 years since imperialist powers gathered in Berlin for the scramble for Africa. Today, the power dynamics between the continent's 54 diverse nations and the rest of the world remain deeply imbalanced. Partnerships are often dominated by external actors and driven by their interests—not Africa's. But the dismantling of old models of development and cuts to traditional aid are a stark wake-up call for Africans to seize the reins of their own development, set their own priorities, speak with a united voice, and define the terms of partnership for shared growth. This requires that Africans move with decisive courage beyond donor-defined agendas, rebalance the table, and reclaim control over their social, economic, and strategic choices.

There's no time to waste. The race for critical minerals today is a direct parallel to the scramble for Africa—where the continent supplied the raw materials for the world's energy and innovation but was denied the jobs, investment, and industrial development that come with processing and value addition. The actors engaged in this scramble are more diverse than before, with countries in Asia and the Middle East playing a pivotal role. The Democratic Republic of the Congo produces more than 70 percent of the world's cobalt, and South Africa holds one of the highest grades of rare-earth elements in the world. Yet the continent retains only 10 percent of global revenue in critical minerals. Without stronger guarantees of local benefit, the current model risks deepening inequality, draining Africa's wealth, and repeating the same patterns that have stifled growth for generations.

Africa accounts for about 18 percent of the world's population yet contributes less than 3 percent of global trade. The continent could generate an additional \$21.9 billion annually through increased exports to the world—a critical boost to domestic growth. However, wealth continues to flow out of Africa as the cost of servicing debt has skyrocketed and the price for accessing capital is up to five times higher when borrowing from capital markets than through affordable loans from multilateral banks. Credit rating agencies grade African economies with a double standard, contributing to unjustifiably higher risk premiums that block off investments needed to drive catalytic growth on the continent.

Western efforts to impose prepackaged—and often flawed—models of democracy, upholding unrealistic expectations without adapting to local political contexts, have undermined stability and sovereignty and often delivered mixed results. African countries are expected to conform to ideals they had little part in shaping.

The current dynamic is broken and unsustainable. Shrinking aid budgets, inequitable trade deals, and imbalanced global partnerships expose a lopsided system that is not

only overdue for rebalancing but was never designed to scale Africa's growth. Global demographic trends underscore the urgency for reform: As the West ages, realizing Africa's youth dividend becomes increasingly important for global economic growth.

The world needs Africa—not as a recipient of charity but as a strategic partner in ensuring global prosperity. Africa is not waiting but moving with vision. Across the continent, governments, civil society, and the private sector are reimagining development away from a series of external interventions and toward an African-led agenda.

AGENDA 2063 OUTLINES an African-led future characterized by inclusive growth, sustainable development, good governance, and peace and security. It is a road map already in motion. One of its flagship projects, the African Continental Free Trade Area (AfCFTA), came into force in 2019, establishing the largest free trade zone in the world. The AfCFTA presents a major opportunity for Africa to connect 1.5 billion people into a single marketplace, with estimates that it could boost Africa's global exports by 32 percent by 2035, grow intra-African trade to 50 percent by 2030, and lift 30 million people out of extreme poverty. For global partners, it offers access to one of the world's most dynamic economic frontiers. But these gains hinge on implementing smart trade facilitation measures under the Digital Protocol: cross-border data transfers, digitizing trade documentation, and streamlining customs to increase efficiency and reduce the costs of trade.

The continent is also transforming its health systems—an area ripe for growth and partnership—where African countries can provide essential health services for their own people without relying on external governments or changes in global leadership. The Platform for Harmonized African Health Products Manufacturing (PHAHM) spans pharmaceuticals, diagnostics, and other health products, with the goal of supplying 60 percent of the vaccines used in Africa by 2040, up from just 1 percent today. PHAHM seeks to make this vision a reality by building an integrated market that fosters demand certainty and drives investment in domestic production. This shift away from dependency stands to strengthen both regional and global health security. Continued investments along these lines will also bolster one of the continent's most strategic assets, its youth.

With more than 60 percent of the population under the age of 25, Africa is home to the world's youngest and fastest-growing workforces. Their potential to be the engine of the continent's transformation and global economic growth is evident in the technology and creative industries. In music, film, and fashion, African creatives are capturing global attention and generating new sources of growth. Sub-Saharan



Active and inactive power lines in Matipwili on Jan. 22.

Africa's music industry is the fastest-growing in the world, its revenue rising by more than 20 percent in 2023 alone. In the face of aging populations in Europe and other world regions, the skills, confidence, and creativity of Africa's youth could serve as the global workforce of the future.

The continent's financial potential is far greater than most imagine, with the capacity to mobilize and retain about \$1.43 trillion in domestic resources alone. While government revenues have grown in absolute terms, this has not consistently translated into increased spending on health, education, and infrastructure. In many countries, rising debt servicing costs are crowding out public investment, limiting the fiscal space needed to deliver essential services and build long-term resilience. Partner countries can play a significant role by developing new mechanisms to lower borrowing costs, enabling African nations to refinance expensive debt.

Instead of relying on global reforms, progressive African actors are investing locally, with homegrown financing models emerging to fill gaps. The African Philanthropy Forum, for instance, has created a network of more than 3,500 philanthropists to drive locally led development and create new pathways for sustainable financing. These efforts reflect a growing ecosystem of African stakeholders committed to shaping their own future.

For these efforts to deliver results, African-led development must replace externally driven plans. Resetting Africa's relationship with the rest of the world means moving beyond paternalism to mutually beneficial partnerships. This overdue shift is gaining momentum, as seen in the fresh vision of new leadership across key African institutions. Figures

In the face of aging populations in Europe and other world regions, the skills, confidence, and creativity of Africa's youth could serve as the global workforce of the future.

such as George Elombi of the African Export-Import Bank, Sidi Ould Tah of the African Development Bank, and Mahmoud Ali Youssouf of the African Union Commission are each steering a vision for Africa's role on the global stage.

Africa must harness its own resources more effectively to accelerate progress on its vision. This includes deploying pension fund assets, diaspora remittances, and sovereign wealth funds more productively while also prioritizing investment in local value chains, driving innovation, and negotiating collectively for better terms of engagement with global partners. At the same time, global cooperation is essential to secure fairer risk assessments, curb illicit financial flows, and create investment environments that reward African innovation.

With the African Union and South Africa collaborating on this year's G-20, there is growing momentum for African-driven systemic change. As the current G-20 president, South Africa has elevated the cost-of-capital agenda to examine the factors driving up the cost of borrowing for African and other developing economies. The AU's permanent seat at the G-20 and South Africa's leadership mark a historic opportunity to champion reforms in sovereign debt restructuring as well as in the international financial architecture that are crucial for promoting sustainable development and reducing debt vulnerabilities in African economies.

The G-20 has a critical role to play in tackling the cost-of-capital issue in particular, as many of the structural drivers of high capital costs are embedded in international financial norms that no single country can change alone. G-20 leaders must commit to an implementation road map that lowers the cost of capital for African and other emerging markets. A credible road map should emerge from the G-20 summit in November that includes (1) improving debt data and transparency, (2) reforming credit rating agency methodologies to better reflect actual risk, and (3) instituting domestic policy measures that de-risk investments. Expanding the use of innovative financing mechanisms by multilateral lenders, along with better targeting of concessional finance, should also be prioritized. Together, these steps are essential for leveling the playing field for countries

with strong development potential but limited fiscal space.

Africa must reframe its future, beginning with a unified front—speaking with one voice through regional and continental platforms on critical issues such as trade, value addition, and the governance of strategic minerals. On the critical minerals front, this entails strengthening individual negotiating power by investing in geological data, harmonizing policy frameworks, and defining the national and regional vision for key minerals to better guide exploration, extraction, and long-term continental development. By setting shared standards and aligning visions, African countries can secure better terms for their critical minerals from global partners that protect sovereignty, reward innovation, and drive inclusive job creation.

Building a resilient future also means fortifying ties across the continent, ensuring collective action to drive climate resilience and intra-Africa trade, and eliminating barriers to travel across the continent.

Most importantly, African governments must commit to building an enabling environment for sustainable investment. This means addressing corruption and leveraging innovation, data, and technology to enhance the efficiency and effectiveness of service delivery of health, education, and security for their cities. It also requires investing significantly in infrastructure, expanding energy access, and enacting targeted reforms that unlock capital and curb illicit financial flows.

Nigeria offers a compelling case study that can be mirrored across the continent. The decades-long pursuit to recover up to \$5 billion looted by former military leader Sani Abacha required coordination across jurisdictions—including France, Jersey, Switzerland, the United Kingdom, and the United States—and resulted in the return of most funds for use in development projects with accountability safeguards. Global partnership was essential to this outcome. Similar dynamics followed the scrutiny of the controversial OPL 245 oil bloc deal, where constructive engagement by the European Union and United States led to stronger transparency frameworks in the extractive sector. Yet many of these measures are being rolled back. With the U.K. signaling interest in leading on transparency during its anticipated 2027 G-20 presidency, this is a crucial opportunity for African nations to partner with foreign governments and renew momentum for driving anti-corruption and accountability across the continent.

Moreover, African nations must show a renewed and visible commitment to reducing political instability and strengthening institutions, scaling investments in peace economies and justice systems.

Likewise, civil society and the African diaspora are critical to driving sustainable change. The diaspora alone—comprising some 200 million people—sent almost

\$100 billion in remittances in 2024, representing a catalytic force for investment and innovation. Together with civil society, it can strengthen local institutions and push for greater transparency.

TO TRULY ENSURE A REBALANCE OF POWER, the rest of the world must do its part. Foreign governments and the private sector must approach African countries as equals. Several countries—including Canada, Denmark, Germany, and the U.K.—have developed new Africa strategies to guide their engagement across trade, investment, and development. While these mark a welcome shift in tone, they often fall short of delivering transformative change. For instance, Canada’s Africa Strategy is a promising first step but lacks substantial investments, de-risking mechanisms, and strategic incentives needed to unlock mutual economic benefit. To rise above paternalistic tropes, foreign governments must back commitments with real investments, clear road maps for engaging with African institutions, and robust systems to track progress.

These strategies alone are not enough. Equitable partnerships are not just about fairness; they are in everyone’s best interest—unlocking sustainable growth, stability, and shared prosperity that will benefit African countries and its partners. Respecting Africa’s right to chart its course must be matched by reforms to the global financial system; a commitment to fairer financing that accounts for present-day vulnerabilities, not outdated income groupings; co-investment in Africa’s people and growth; and a shift from extractive contracts to domestic value-added production, particularly in the critical minerals sector.

Africa is not asking for handouts. It offers opportunities in the form of ingenuity, innovation, and young workforces ready to power the global economy. Rebalancing the table means a reimagined partnership defined by Africans, rooted in equity and mutual respect, and driven by shared prosperity. ■

NDIDI OKONKWO NWUNELI is the president and CEO of the ONE Campaign.

To rise above paternalistic tropes, foreign governments must back commitments with real investments, clear road maps for engaging with African institutions, and robust systems to track progress.

| Interdisciplinary
Curriculum| Personalized
Career Guidance| Global Field
Experiences**DIRECTOR OF STRATEGIC
PARTNERSHIPS**

Emma Braithwaite
emma.braithwaite@
foreignpolicy.com

The copy in this report was prepared by independent writers in connection with the business department of *Foreign Policy*, and did not involve the editorial staff of this magazine.

EDITOR

Tara Shubuck

WRITERS

Christa Avampato
Veronica Gorodetskaya
Karen Jensen
Seamus Roddy
Rich Shea
Tara Shubuck

COPY EDITOR

Rachel McVeary

DESIGNER

Tara Shubuck

Career Resilience

Developing Professional Adaptability in a Changing World

As the global landscape shifts and the walls between disciplines and sectors blur, international affairs professionals are confronting a new reality: the need to develop professional adaptability to future-proof their career. This crucial ability to integrate diverse knowledge and skills allows one to pivot between sectors and analyze complex issues from fundamentally different perspectives, whether it's viewing a public health crisis through an economic lens or interpreting a geopolitical conflict by its technological, security, and environmental underpinnings.

Mastering this skill requires a specific kind of training, and the solution lies in a graduate education. These programs provide an interdisciplinary framework for understanding complex, interconnected issues, while also equipping students with critical skills to connect and collaborate with people from different backgrounds to solve problems together.

This special-edition *FP Guide* explores how leading graduate programs are redefining international affairs education to prepare their students to adapt, pivot, and lead throughout their career.

GEORGETOWN UNIVERSITY ▶ SCHOOL OF FOREIGN SERVICE

Preparing the Next Generation of Leaders for Tomorrow's Global Order

“We're uniting people from diverse backgrounds who are committed to serving the world to generate new ideas that will help us find better ways of addressing global problems.”



— JOEL HELLMAN,
Dean, School of Foreign
Service, Georgetown
University

As the first school of international affairs established in the United States, Georgetown University's School of Foreign Service (SFS) is an important player in helping define the study and practice of international affairs. “We feel a particular responsibility to be thinking about tomorrow's understanding of international affairs because we helped define the last century,” says Joel Hellman, dean of SFS.

The school's location in Washington, DC, is uniquely positioned to bring together graduate students, researchers, and an unparalleled alumni network to address current challenges and embrace future opportunities to serve the world. In addition, SFS has an innovative, forward-looking curriculum that enables students to focus on new problems affecting the global order.

“Building on the success of our multidisciplinary approach, which has helped foster cultural empathy and understanding of global issues for over a century, we've introduced several unique aspects to the Georgetown SFS curriculum,” Hellman explains.

The school's Center for Security and Emerging Technology is a policy research organization looking at the security implications of emerging technologies, including artificial intelligence, advanced computing, and biotechnology.

There are also two new degree programs that explore critical issues shaping international affairs: the MA in International Migration and Refugees and the MS in Environment and International Affairs, jointly offered with Georgetown's Earth Commons Institute. They're among the school's 13 thematic, regional, and joint degree programs, as well as executive degrees for mid-career professionals.

Immersive Policy Courses with Experiential Learning

Bridging the gap between academic theory and real-world practice, immersive policy courses are taught by an experienced practitioner in the field who has implemented policy ideas. They allow graduate students to collaborate on practical solutions for development problems.

At Georgetown SFS Asia Pacific, students can take the “Mining, Minerals, and Management” course, which offers a 360-degree look at the economic, political, social, technological, and environmental issues surrounding mining and critical minerals development. Students visit mines, processing sites, and activists in Indonesia.



To reflect changing global dynamics and voices from the Global South, SFS has locations in Jakarta, Indonesia, and Doha, Qatar. According to Hellman, “We want to expose the next generation to the ways others see global problems to influence their thinking on building alliances and coalitions.”


Hellman also adds that it's a great time for graduate study despite the changing environment and uncertainty: “There will be incredible opportunities for people who are well prepared, especially those with new thinking.”

The SFS Career Center is already preparing students to land a job and know how to pivot to new sectors while maintaining their commitment to purpose. It's the connecting point for engaging with the school's diverse and influential alumni network. Students can take advantage of incredible opportunities and events for learning, mentorship, and networking as they become part of an extraordinary community of SFS graduates shaping the new global order.

LEARN MORE

- 🌐 sfs.georgetown.edu/admissions/graduate-programs
- ✉ sfsgrad@georgetown.edu
- 📞 202-687-9267



An aerial photograph of Georgetown University in Washington, D.C. The image shows the university's red brick buildings with dark roofs and spires in the foreground. In the middle ground, the Potomac River flows through the city, with a bridge visible on the right. The background features the Washington Monument and other city buildings under a clear sky.

**Best placed.
Best connected.
#1 in the world for
international relations.**

Politics change. Politicians come and go. But for more than a century, Georgetown's School of Foreign Service has prepared the leaders who define the global order. At SFS, you'll develop ideas that shape the world and learn from people who turn those ideas into impact.



For more information,
scan the QR code.

UNIVERSITY OF DENVER ▶ JOSEF KORBEL SCHOOL OF GLOBAL AND PUBLIC AFFAIRS

Strategic Shift Strengthens Graduates' Preparation for Tomorrow's Challenges

“There's no denying that the career landscape has changed, and we're adapting by assisting our students in finding work both domestically and internationally.”



— **FREDERICK MAYER**,
Dean, Josef Korbel
School of Global
and Public Affairs,
University of Denver



The institution formerly known as the University of Denver's Josef Korbel School of International Studies has a proud new name: the Josef Korbel School of Global and Public Affairs. “This change reflects the culmination of the school's long evolution from its research roots into a professional school,” says Frederick “Fritz” Mayer, the school's dean, “one that empowers future leaders to address the world's most pressing issues in both global and domestic affairs.”

The new name also reflects the school's pivot to meet this moment in history. “So much that we thought was settled is now unsettled,” Mayer explains. “We're looking at the implications of a changed global balance of power, new roles for the private and nonprofit sectors, the AI revolution, and the fragile state of democracy around the world. And we're reemphasizing the importance of equipping our students to think and act ethically.” As part of that commitment, Korbel is leading an effort by many of the world's top schools of international and public affairs, funded by the Carnegie Corporation of New York, to rethink how to prepare students to lead in a changing world.

This forward-thinking approach isn't just about curriculum development; it's profoundly shaped by the people who deliver it. The Korbel School boasts an extraordinary interdisciplinary faculty of leading scholars who are focused on finding solutions and equally passionate about teaching and mentoring. With its low student-to-faculty ratio and small class sizes, students can really engage with the faculty.

Further, as Mayer explains, “it's important

in a school where you're training future professionals to have faculty with professional experience. Just one example is Carol Spahn, former director of the Peace Corps. She brings extraordinary experience, years of working in Africa in development, and her time at the Peace Corps. That's the kind of person who offers so much, who can speak with extensive field experience, and understands the career options for students.”

This commitment to preparing well-rounded, effective global

leaders extends beyond the classroom and past graduation. Korbel offers robust career services and support, which includes an extensive alumni network of over 7,000. “Our alumni are everywhere, doing amazing things in governments, in nonprofits, and in the private sector,” Mayer says. “And they love nothing more than to pay it back by helping the next generation of Korbel graduates.”

An Ideal Vantage Point

Located in Denver, Colorado, Korbel's distance from Washington, DC, allows for critical reflection. “Being in DC, it's hard not to get drawn into the day-to-day drama,” says Mayer, “but there's rarely a moment to step back and ask, ‘What's the big strategy?’ As we like to say, ‘You can see far from here.’”

At the same time, Korbel's location offers a close-up of what Mayer calls Colorado's “very functional government” — a laboratory for approaching pressing issues and policymaking.

LEARN MORE

🌐 korbel.du.edu

✉️ korbeladm@du.edu

New Name. Same Mission.



Josef Korbel School of
Global and Public Affairs
UNIVERSITY OF DENVER

**Evolving to meet the moment.
Preparing students to shape
what comes next.**

**The Josef Korbel School of
Global and Public Affairs**
prepares adaptable, purpose-
driven leaders who think critically,
engage across perspectives,
and drive meaningful change.

**Our new name reflects who we've
always been:** a school rooted in
global affairs, committed to public
good, and focused on the future.

Your next chapter starts here.
Explore our graduate programs.



korbel.du.edu

“The combination of academic collaboration, clubs, and alumni engagement helps students understand the full range of global career opportunities and gives them the flexibility to pivot when needed.”



— MICHAEL MCKENZIE,
Assistant Dean for
Global Careers,
School of Advanced
International Studies,
Johns Hopkins
University

JOHNS HOPKINS UNIVERSITY ▶ SCHOOL OF ADVANCED INTERNATIONAL STUDIES

Shaping Confident, Forward-Thinking Global Professionals



Students at Johns Hopkins University’s School of Advanced International Studies (SAIS) learn early on to expect change throughout their career — and to adapt strategically and confidently across sectors and roles.

Amid ongoing shifts and evolving job markets, Michael McKenzie, assistant dean for global careers, offers a steady outlook. “Things change and we have to adjust,” he says. “You can’t control what happens, but you can control your response. The ability to reflect on your skills and translate them, that’s key.”

Adaptability is intentionally cultivated at SAIS through an integrated academic model that mirrors the interconnectedness of the global landscape. The school’s flagship master’s degree programs — the MA in International Relations; MA in Strategy, Cybersecurity, and Intelligence; and MA in International Economics and Finance — are designed to foster interdisciplinary engagement.

“Although the programs have very structured, specific curricula, there’s still crossover,” McKenzie says. “The professors are teaching across multiple programs, so students are exposed to a broader mix of perspectives.”

This academic integration is reinforced through joint initiatives, collaborative projects, shared career clubs, and global career treks across the US, Europe, and Asia. These experiences build networks, expand global awareness, and give students the chance to explore roles in public policy, finance, consulting, and emerging sectors, like technology and AI, while developing the agility to move between them with confidence.

SAIS builds student expertise through a combination of rigorous, skills-based coursework and real-world application. Classes in areas such as

quantitative analysis, risk assessment, and strategic planning are taught by professionals with extensive experience in government, multilateral institutions, and the private sector. Students apply these skills in internships at institutions like the World Bank and US Department of State, and in faculty-led practicum courses with client-facing consulting engagements that prepare students to perform in complex, fast-changing environments.

Through its global presence in Washington, DC; Bologna, Italy; and Nanjing, China, SAIS gives students access to regionally grounded expertise, diverse professional networks, and a uniquely international perspective that deepens their understanding of global dynamics and enhances career readiness. “I’ve seen people at SAIS go into government, then pivot. They move around the world,” McKenzie explains. “Those stories become part of our own institutional knowledge, which is really helpful for students to see a bit of the path forward.”

Expert Guidance and Real-World Connections

To advance their professional goals, students can work one-on-one with experienced SAIS global careers counselors, gaining tailored guidance in defining objectives, exploring career paths, securing internships, and developing personalized plans. They sharpen market-ready professional skills through professional development courses, industry-specific job search workshops, and over 20 professional skills courses. The program also opens doors to a vast alumni network and potential employers through career treks, industry days, and employer presentations that often lead to internships, job offers, and lasting professional connections.

LEARN MORE

🌐 sais.jhu.edu
✉ sais.dc.admissions@jhu.edu
☎ 202-663-5600



JOHNS HOPKINS
SCHOOL of ADVANCED
INTERNATIONAL STUDIES

BECOME A LEADER

the World Needs



The world needs bold leaders who have the skills, knowledge, and experiences required to meet the complex challenges of a fast-changing global landscape.

Recognized as one of the top international relations schools in the world, Johns Hopkins School of Advanced International Studies (SAIS) prepares future leaders through a cutting-edge education fusing **academic rigor** and **policy relevance** across disciplines—in international relations, global policy, international economics and finance, national security and intelligence, technology policy, and regional and language studies.

Learn how a SAIS degree and our **three-continent-wide campus network** can launch you into a meaningful, successful career with **global impact**.

[SAIS.JHU.EDU](https://saiss.jhu.edu)

WASHINGTON, D.C. • BOLOGNA, ITALY • NANJING, CHINA

THE FLETCHER SCHOOL AT TUFTS UNIVERSITY

Navigating Complexity Through a Multifaceted, Ongoing Commitment to Student Development

“If there’s a motto we live by at The Fletcher School, it’s that students leave here knowing how to navigate complexity.”



— DANIEL DREZNER, Distinguished Professor of International Politics and Academic Dean, The Fletcher School, Tufts University

Distinguished Professor of International Politics and Academic Dean Daniel Drezner encapsulates the design of The Fletcher School at Tufts University’s graduate programs with a single motto: to enable graduates to navigate complexity. This ability, he explains, stems from a three-pronged approach, where experiential learning, academic research, and ongoing professional development equip students to be resilient and valuable in a volatile market.

“When you go to Fletcher, you’re receiving help and development while you’re in the program and after you leave,” Drezner says. “We combine different academic and practical elements so that students have skills for jobs and the general ability to learn and deal with complexity in their chosen field.”

Students gain practical experience through internships, conferences, simulations, and competitions. They participate in practicums at nongovernmental organizations in the US and abroad and at health and tech organizations in Greater Boston. Drezner has also led student treks in the Western Balkans as part of the Russia and Eurasia program he co-directs, providing on-location experience in geopolitical hotspots. On these trips, students write cable memos that mirror those produced by analysts at US federal agencies.

Undergirding these opportunities is Fletcher’s rigorous academic training, which includes 11 graduate residential and online degree programs in three tracks: international affairs, international business, and specialized degrees. One STEM-designated or STEM-focused degree is

Holistic Preparation for Proven Career Success

Fletcher students receive a rigorous, holistic education mapped to their career goals, while also building a global professional network.

This support is made possible by the Office of Professional Development, which in the past year conducted 985 career coaching sessions and listed 2,561 internships, jobs, and fellowships. These efforts resulted in 96 percent of graduates finding meaningful job placements within six months, 34 percent of which were in the private sector.

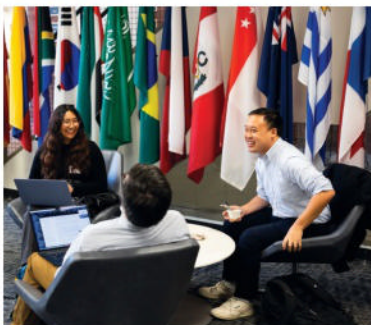
offered for each track, helping students develop in-demand research skills. “Experiential learning is important, but the jobs we want our grads to obtain require the ability to perform strong research, and we provide that training ground,” Drezner says.

The third pillar of Fletcher’s strategic approach is its career services, recently restructured and now known as the Office of Professional Development. This change reflects the reality that Fletcher graduates work across — and oftentimes cycle through — three career tracks: government, civil society, and the private sector. As a result, Fletcher provides ongoing professional development for alumni and comprehensive career programming for students, including trips to New York and Washington, DC, for site visits and networking.

Beyond formal initiatives, Drezner sees the camaraderie fostered by Fletcher’s full-time graduate programs as a bulwark against an unpredictable job market. “The last time I was in DC, we had 300 or 400 alumni show up to a Fletcher event,” Drezner notes. “That camaraderie and network is essential throughout your career.”

LEARN MORE

- 🌐 fletcher.tufts.edu/programs/masters
- ✉ fletcheradmissions@tufts.edu
- 📞 617-627-3700



Where knowledge meets practice

Discover a degree that's practical,
powerful, and future-ready.

Shape your career future through:

- Interning around the world
- Presenting at conferences
- Completing a capstone
- Consulting with clients
- Publishing in journals
- Studying abroad, and
so much more

**Learn more
today!**

Fletcher.Tufts.Edu

Tufts
UNIVERSITY

f1 FLETCHER

The graduate school of global affairs at Tufts University



“**Rice’s Master of Global Affairs is designed to equip students with sought-after skills and experiences that translate across numerous sectors and industries, even in times of global transitions.**”



— **ABBEY GODLEY**,
Assistant Dean for
Student Programs,
School of Social
Sciences, Rice
University

RICE UNIVERSITY ▶ MASTER OF GLOBAL AFFAIRS

Cultivating Agile Global Leaders Through Immersion in Diverse International Settings

Experiential learning is a necessary component of a graduate education, but Rice University’s Master of Global Affairs (MGA) distinguishes itself through a deeply immersive approach that enables students to actively engage with global systems. Notably, its International Masterclass and Diplomatic Immersion, Policy Learning, and Observation (D.I.P.L.O.) programs give students direct exposure to real-world global challenges and diplomatic practices, helping them cultivate skills in cross-cultural communication, problem-solving, and global leadership.

This spring, the International Masterclass took second-year MGA students to Paris to apply classroom knowledge to real-world contexts. There, they worked on applied projects and simulated activities in collaboration with the Institute for Global Negotiation, as well as policymakers and nongovernmental organizations, gaining insight into global governance, negotiation strategies, and transnational issues.

“Our aim is to deepen students’ understanding of global systems, challenges, and solutions in unfamiliar, dynamic contexts that broaden their worldview and strengthen their intercultural agility,” says Abbey Godley, assistant dean for student programs at Rice’s School of Social Sciences.

Vera Zhao, from the MGA class of 2025, participated in the spring semester International Masterclass, saying: “The trip to Paris and working with the Institute for Global Negotiation was an incredible and unforgettable experience that pushed us out of the classroom and into real-world scenarios, truly putting our skills to the test.”

Locally, Rice leverages Houston’s international community through the new D.I.P.L.O. program, founded this year by MGA students in partnership with the consul general of France in Houston and

Applicants Should Consider Program Concentrations with a Sense of Purpose

Rice University’s Master of Global Affairs has three program concentrations: International Security, International Political Development, and International Political Economy.

Applicants are evaluated on various factors, such as having strong analytical skills. Another consideration is work experience, or having had significant international experience as an undergraduate, including internships, research work, or study abroad. For all applicants, excellent letters of recommendation and a clear sense of purpose and direction for pursuing graduate education at Rice are also admissions must-haves.



the dean of the local consular corps. This initiative immerses first-year students in consular work, provides mentoring by consuls general, and culminates in a diplomatic simulation and drafting of a policy paper.

“Houston is home to the United States’ third-largest consular corps, so the D.I.P.L.O. program offers an extraordinary opportunity to participate in tangible experiences that demonstrate the direct impact of policy, social issues, and economic dynamics in our global city,” Godley explains.

Pairing immersion with coursework equips students to thrive in a changing global landscape. Within six months of graduation, MGA graduates found roles in the private sector (64 percent), public sector (19 percent), and foundations or nonprofits (16 percent).

“As demonstrated by the successful and varied career outcomes of our graduates, Rice’s Master of Global Affairs is designed to equip students with sought-after skills and experiences that translate across numerous sectors and industries, even in times of global transitions,” Godley says.

LEARN MORE

🌐 mga.rice.edu

✉ mga@rice.edu

📞 713-348-2367





RICE UNIVERSITY

Master of Global Affairs

RICE ROOTS, GLOBAL REACH.

FALL 2026 APPLICATION NOW OPEN

The Master of Global Affairs is a two-year, professional master's degree sponsored by **Rice University's Baker Institute for Public Policy** and the **School of Social Sciences**. Students complete rigorous course work that compels high standards of scholarship and offers practical training for careers in government, the private sector, and international organizations, thus producing graduates with a broad global perspective requisite of leaders for the next century.

**APPLY
TODAY:**



[BIT.LY/GLOBAL-AFFAIRS-APPLY](https://bit.ly/global-affairs-apply)

“With major changes in alliance architectures, global alignments, and trade, our work is more important than ever. Understanding these shifts requires the skills and insight our program provides.”



— MITCHELL SMITH,
Director, School of
International Affairs,
Penn State University

PENN STATE UNIVERSITY ▶ SCHOOL OF INTERNATIONAL AFFAIRS

Core Skills Drive Resilience to Navigate New Career Frontiers



Penn State’s School of International Affairs (SIA) has long emphasized core skills like negotiation, evidence-based analysis, and effective communication to prepare students for impactful careers across sectors. Now, in response to global shifts, the school is reinforcing these competencies while expanding pathways into emerging fields.

“We’re reviewing our curriculum, taking a closer look at the skills we instill and asking, how can we do this even more effectively,” explains the school’s director, Mitchell Smith. “One area that deserves more attention right now is the global economy.”

Supporting the school’s effort to refine its academic approach and alignment with the evolving professional landscape is a vast, close-knit global network of alumni whose on-the-ground experience and broad reach make them uniquely attuned to developments in the field. “Our alumni have developed a sophisticated understanding of their career paths and the world of work,” Smith says. “They offer tremendous insight.”

During a recent panel, alumni noted that while some traditional roles are consolidating, new opportunities are emerging — particularly in smaller government bodies, state agencies with international dimensions, and the financial sector.

The school’s inherently interdisciplinary model offers another key advantage. Students can take electives across Penn State’s colleges, from cybersecurity courses at the College of Information Sciences and Technology to media training in the College of Communications.

This flexibility broadens students’ skill sets and reinforces transferability across sectors and roles, preparing them to adapt to the hybrid challenges

of today’s global workforce. Smith highlights an example of an alum who leveraged skills honed in international aid to effectively coordinate disaster relief at the local government level. “It’s an important message to our students: Even if they imagine a career in the federal government, the private sector can also offer a productive path,” he says.

To boost adaptability and real-world exposure, SIA’s career trips to the World Bank and the Center for Strategic and International Studies will now include simulation exercises, in addition to the school’s signature international strategic crisis negotiation exercise with the US Army War College. Simulation-based learning is likewise growing in classrooms, offering students more opportunities for hands-on experiences.

Smith is confident that the skills and experiences students gain at SIA form a strong foundation for long-term career adaptability — regardless of future changes in the field. He also underscores the school’s commitment to continuous, individualized career support, starting from day one and lasting well past graduation day.

Extensive Career Services and Alumni Connections Help Foster Success

SIA offers comprehensive career services, including professional development workshops, résumé and cover letter review, job search assistance, and help identifying internships in the US and abroad. It organizes career-exposure trips to Washington, DC, and New York City, and hosts on-campus job talks and panels.

Students tap into the powerful Penn State network, with 800,000-plus alums worldwide. The school connects students with SIA alums in multiple ways, including at networking receptions and through the school’s Alumni Mentorship Program.

LEARN MORE

- 🌐 sia.psu.edu
- ✉ admissions@sia.psu.edu
- ☎ 814-867-2242



PennState
School of
International Affairs

ADVANCE YOUR **GLOBAL** CAREER

An innovative education for the next generation of global leaders. We prepare students for career success in the fields of policy, diplomacy, security, development, and more.

Join Our Globally Engaged Community

Earn a Master of International Affairs degree at Penn State and get the best of both worlds: a small, hands-on graduate program with access to all the resources of a world-class research institution.

Our graduates are shaping policies, driving innovation, and fostering understanding across cultures. Are you ready to join them?



**LEARN
MORE**



“We designed the program to make sure that students have ample publication opportunities.”



— **CRAIG ALBERT**,
Graduate Director of
the MA in Intelligence
and Security Studies
and PhD in Intelligence,
Defense, and
Cybersecurity Policy,
Pamplin College of
Arts, Humanities,
and Social Sciences,
Augusta University

AUGUSTA UNIVERSITY ▶ PAMPLIN COLLEGE OF ARTS, HUMANITIES, AND SOCIAL SCIENCES

PhD Program Prioritizes Student Publication Opportunities

Augusta University’s new PhD in Intelligence, Defense, and Cybersecurity Policy program is turning the traditional doctoral experience on its head. Not only is it the first of its kind, catering to working professionals across the globe with fully remote, synchronous online classes, but it’s structured to give students ample guidance to help them navigate the complex path to publication.

“We’re uniquely specialized as a program where we really take that seriously,” says Craig Albert, graduate director of the PhD program and the MA in Intelligence and Security Studies. “We don’t want students to be lost and wandering in the PhD world. So many people get trapped, and then they end up what’s called ABD — all but dissertation — because they didn’t have proper guidance or direction. We’re designed to prevent that from happening. As the director and faculty advisor, I give each student as much attention as needed to progress toward degree completion.” Albert also stresses that the program provides individualized pathways for each student to prepare them for career success.

This fall’s inaugural class has the support of a dedicated program manager, a full-time faculty advisor, and faculty who focus solely on PhD students. Robust mentorship is an integral part of the program, with opportunities for co-authoring, graduate research assistants, and advanced independent research courses.

Helping students build a portfolio of published work is a priority given its importance in the academic and professional landscapes. To facilitate this, required coursework addresses the development of advanced technical writing skills for



Master of Arts in Intelligence and Security Studies



The MA in Intelligence and Security Studies provides a rigorous foundation for advanced studies in intelligence and security. Students can specialize in Information Warfare (synchronous online) to explore the complex dynamics of influence operations or Technical Intelligence Analysis (asynchronous online) to develop expertise in data-driven intelligence. “If people aren’t sure about the PhD, they can check out the master’s program, see how they like it, and if they excel in it and want to continue, they can roll right into the PhD,” Albert says.

different professional contexts. Through these classes, Albert says, “they can pivot their career choices toward either the intelligence and government community, which uses the technical writing skills that we teach, or to academic or think tank communities that prefer the research-based academic writing style.”

Armed with the necessary skills, students are guided through the writing and publication process with what Albert describes as “active and engaged advising” by either himself or the student’s mentor. Students have ample opportunities to co-author, but if they want to publish as a sole author, Albert explains, “we’ll instruct and teach them what the proper processes are.”

This student-focused approach ensures that PhD candidates not only complete their degree, but also emerge as published scholars, well-prepared for careers in academia, government, or the private sector.

LEARN MORE

- 🌐 augusta.edu/defensestudies
- ✉ defensestudies@augusta.edu
- 📞 706-737-1710



AUGUSTA UNIVERSITY

PhD Intelligence, Defense and Cybersecurity Policy

Earn your PhD online at Augusta University.
Gain expertise in US national security,
intelligence, defense and cybersecurity.

APPLY TODAY!

www.augusta.edu/defensestudies

defensestudies@augusta.edu

706-737-1710



“**What distinguishes us is the close interaction between faculty and students and among students themselves, along with personalized guidance and practical, real-world application.**”



— **GISELLE DATZ**,
Chair of the
Government and
International Affairs
Program, School of
Public and International
Affairs, Virginia Tech

VIRGINIA TECH ▶ SCHOOL OF PUBLIC AND INTERNATIONAL AFFAIRS

Flexible, Personalized, Engaged Learning in the Nation's Capital

With campuses in both Blacksburg and Arlington, Virginia — right in the heart of the Washington, DC, metro area — the School of Public and International Affairs (SPIA) at Virginia Tech stands out for its small class sizes, personalized mentorship, and dynamic student body.

Giselle Datz, chair of the Government and International Affairs program, says, “From day one, students can count on the mentorship of a dedicated faculty member who will serve as their academic adviser throughout the process — guiding them through individual trajectories shaped by their research interests all the way to the finish line.”

Flexible at its core, the Master’s of Public and International Affairs and the PhD program offer evening and online classes tailored to diverse student profiles. SPIA attracts recent graduates seeking deeper scholarly engagement and hands-on experience, as well as mid- and senior-level professionals looking to transition careers or transform practical experience into original scholarship.

The combination of intentionally small seminar courses and a diverse student body fosters a rich classroom dynamic where, as Datz explains, “traditional students and working professionals — from the federal government, NGOs, or the private sector” — take part in lively discussions grounded in the evolving realities of policymaking rather than purely abstract theoretical debates. Given the interesting mix of students with different backgrounds, professional networking happens not only outside, but also within the classroom.

The multidisciplinary curriculum, combined with a faculty whose expertise and practical experience span critical geopolitics, global political economy, global conflict, US foreign policy, and cybersecurity, ensures that students engage with diverse perspectives and are well equipped to nav-

Graduate Certificates to Broaden Expertise and Opportunity

SPIA’s professional graduate certificates are designed to strengthen expertise and credentials in high-demand areas, such as:

- Homeland Security Policy
- Nuclear Science, Technology, and Policy
- Urban and Regional Economic Development
- Global Planning and International Development
- Security Studies
- European and Transatlantic Studies

Open to degree and non-degree students, certificates can be completed in a year or less and may be applied toward a graduate degree, providing a strategic track to enhance a résumé or pivot to new career opportunities.

igate the complexities of today’s policymaking landscape. “Multidisciplinary for us means that students search for answers to key policy questions wherever the data and analysis may lead them,” Datz explains. “That is where the most compelling contributions happen. Original research comes from pursuing answers without strict disciplinary constraints.”

Virginia Tech’s Center for European Transatlantic Studies, Tech4Humanity Lab, Center for Public Administration and Policy, and Urban and Environmental Policy and Planning Program provide additional research opportunities in areas like transatlantic relations, cybersecurity, environmental policy, and public health. Each adds to the resources available to students, facilitating data-driven explorations that aim at yielding meaningful policy insights.

Virginia Tech’s alumni network — known as the Hokie Nation — is another formidable asset. “This network is hands-on, vibrant, and very eager to engage with current students, answer questions, provide mentorship, and offer a sense of community that goes far beyond graduation,” Datz adds.

LEARN MORE

- spia.vt.edu
- spia@vt.edu





LIBERAL ARTS AND HUMAN SCIENCES
SCHOOL OF PUBLIC AND
INTERNATIONAL AFFAIRS
VIRGINIA TECH.

THINK GLOBAL. INNOVATE. SHAPE WHAT'S NEXT.

In Blacksburg
and Arlington, at
the heart of the
D.C. metro area



LEARN MORE

- Flexible scheduling that accommodates working professionals
- Personalized experience with faculty guidance from day one
- Vibrant alumni network across the public and private sectors
- Exceptional value



Arlington, VA

Blacksburg, VA

Master's Programs

- Public Administration (MPA)
- Urban and Regional Planning (MURP)
- Public and International Affairs (MPIA)

PhD Programs

- Public Administration and Public Affairs (PAPA)
- Planning, Governance and Globalization (PGG)

Graduate Certificates

- Europe and Transatlantic Studies
- Economic Development
- Local Government Management
- Middle East Politics and Society
- Nonprofit and Non-Government Organizations Management
- Nuclear Science, Technology and Policy
- Public and Nonprofit Financial Management
- Security Studies
- Spatial Information Technology
- State Planning and International Development
- Transportation Planning and Policy
- Watershed Management

“
We need and want our students to leave us with strengths in pivoting and adapting. It’s not just that you’ll adapt to change — you’ll be part of architecting it.”



— SHANNON HADER,
Dean, School of
International Service,
American University

AMERICAN UNIVERSITY ▶ SCHOOL OF INTERNATIONAL SERVICE

A Diversity of Education, Experiences Develops Agile Professionals

The most valuable skill for navigating an unpredictable global landscape is not specialization, but what Shannon Hader, dean of American University’s School of International Service (SIS), calls “agility of thought.” At SIS, this is fostered by a pioneering approach to the structure of its departments and curriculum, which are both interdisciplinary and intersectional. This combination allows students to develop expertise in a topic while understanding its interplay with different disciplines.

“SIS has always put a premium on this ability to pivot and move between and across sectors,” explains Hader. “We teach on issues and skills, not on sectors. So if you want to be a climate scientist and policy analyst, you should be able to understand what working in that area would look like from inside the government, from an activist organization, or from the private sector. That agility of thought also gives you an agility of sectoral access over a career.”

From an intersectional standpoint, the curriculum is structured so that students studying migration, for example, also understand how this field intersects with others, such as global security and human health. Hader explains, “You have to have a working knowledge of that intersection around your topic if you’re really going to be an expert and a problem-solver.”

SIS students have the opportunity to select topics and regions to develop independent research and expertise. This exercise is about cultivating deep knowledge, but beyond that, it also teaches skills that graduates can utilize throughout their career. “It’s developing a practice that is really important in whatever job role you’re going into,”

A Lifelong Community and Career Network



SIS’s dedicated career office provides lifelong access to specialized resources for globally oriented careers, including mentorship and job opportunities through SIS’s worldwide alumni network of more than 25,000. Students who engage with career services see results: 87 percent of May 2024 graduates secured employment or continued education within six months. “Your SIS alumni community, your SIS career center, your SIS faculty should always be a trusted community for you to explore,” Dean Hader explains.

Hader explains. “A lot of employers recognize that, having gone through the exercise of diving deep and becoming an expert, gives you a substance for other topics.”

Applied experience, another pillar of an SIS graduate education, takes many forms, including international practicums, collaboration on faculty research, courses where students produce professional products for client organizations, and strategic partnerships, like SIS’s newly formalized collaboration with the Organization for American States.

SIS’s holistic approach — combining an interdisciplinary and intersectional education with hands-on experience — cultivates a generative mindset that enables graduates to build new solutions for the future. “We need and want our students to leave us with strengths in pivoting and adapting,” Hader says. “It’s not just that you’ll adapt to change — you’ll be part of architecting it.”

LEARN MORE

- 🌐 american.edu/sis
- ✉ sisgrad@american.edu
- 📞 202-885-1646





purpose
perspective
character
competence
service
leadership

DO GLOBAL. DIFFERENTLY.

The **School of International Service** (SIS) is a top-10 school of international affairs based in Washington, DC.

We prepare students to **build successful, impactful careers** in government, nonprofits, and the private sector. Since our founding in 1957, we have answered President Dwight D. Eisenhower's call to prepare students of international affairs for the work of "waging peace."

SIS is the place for people who want to **do global differently.**



SCHOOL of INTERNATIONAL SERVICE
AMERICAN UNIVERSITY • WASHINGTON, DC

american.edu/sis

“**At the Elliott School, we are preparing students to lead with creativity, cultural intelligence, and practical expertise in an increasingly interconnected and uncertain world.**”



— **RENATA AVELAR GIANNINI**,
Assistant Dean of
Executive Education
and Special Initiatives
and Associate
Professor of the
Practice of International
Affairs, Elliott School
of International
Affairs, The George
Washington University

THE GEORGE WASHINGTON UNIVERSITY ▶ ELLIOTT SCHOOL OF INTERNATIONAL AFFAIRS

Navigating an Unpredictable World Requires Education Rooted in Practice



In today’s rapidly changing world, international affairs professionals must be equipped to navigate uncertainty and complexity like never before. The graduate programs at the George Washington University’s Elliott School of International Affairs answer this call with an interdisciplinary education that emphasizes experiential learning throughout its curriculum.

The Elliott School’s Global Capstone Program and Short-Term Abroad Programs (STAP), for example, provide an opportunity to apply classroom learning to real-world situations. In the 2024-25 academic year, the 130 STAP students traveled to 21 countries with 15 faculty members to meet with 20 governmental stakeholders involved with climate change, state-society relations, and gender and security. In the Global Capstone Program, students completed 51 projects for 34 clients, including the US Department of State, International Monetary Fund, and Federal Bureau of Investigation, on topics such as cybercrime, human rights, renewable energy, and migration.

“These programs allow students to engage directly with real-world policy challenges in diverse geographic and thematic contexts,” says Renata Avelar Giannini, assistant dean of executive education and special initiatives and associate professor of the practice of international affairs at the Elliott School. “The breadth of topics and caliber of clients underscore the program’s value in cultivating students’ research, analysis, and problem-solving abilities.”

In addition to in-person training, the Elliott School uses online education as a transformative platform. It allows learners, regardless of geography or personal circumstance, to participate in the university’s intellectual and civic life.

“Online education has long been underestimated,” Giannini says. “It’s not just a Zoom call or pre-recorded video; every online course is created and run by committed professionals mapping learning outcomes and curating resources to ensure students are fully immersed in the content.”

The school offers hybrid and fully online programs. The

Master of International Policy and Practice degree is an online program for working professionals who have another advanced degree or seven or more years of full-time work experience. The content has three pillars: leadership, data analysis, and strategic policy design. The MA in Security Policy Studies has two tracks: a fully remote option with a concentration in US national security and a hybrid option that allows students to take online and in-person courses with concentrations in US national security, transnational security, conflict resolution, and science and technology.

Professional Credentials Grow Practical Skills

The Elliott School also offers microcredentials to working professionals who want to shift career paths or enhance their competitiveness in their current field without committing to a full degree. “Microcredentials are short, practice-oriented credentials allowing learners to focus on one topic to build targeted, in-demand skills,” says Giannini. Available topics include data analysis, leadership in international affairs, and US foreign policy. They are delivered in online, in-person, and hybrid formats to meet the needs of a global audience.

LEARN MORE

🌐 elliott.gwu.edu
✉️ esiagrad@gwu.edu
☎️ 202-994-7050

**OUR MOST
PRESSING
GLOBAL ISSUES
CANNOT WAIT.**

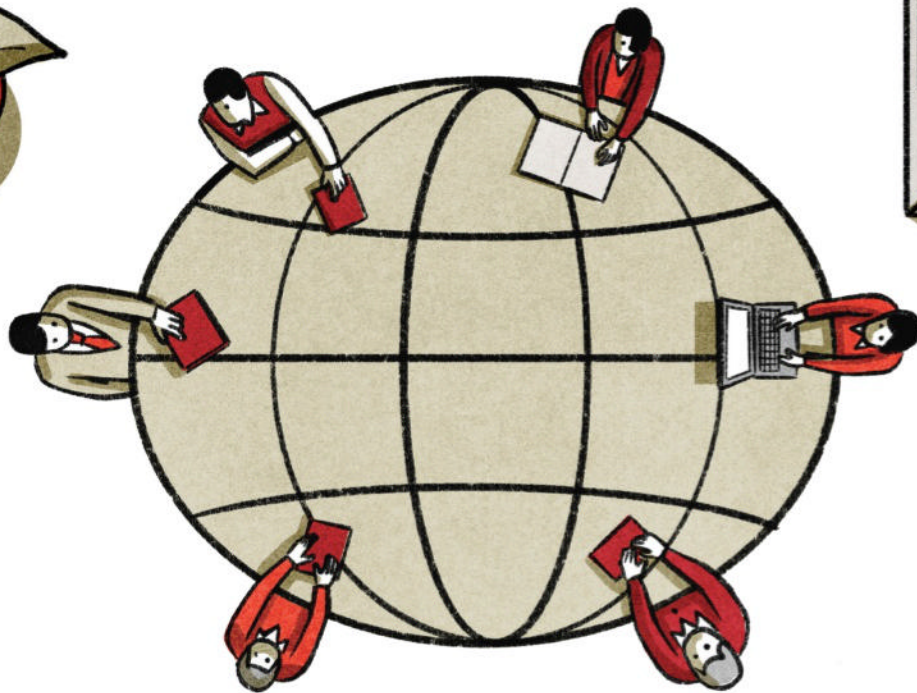
*Neither
Should You.*

Explore the lifelong value of a master's degree from the Elliott School of International Affairs in the heart of Washington, D.C.

**Elliott School of
International Affairs**

THE GEORGE WASHINGTON UNIVERSITY

GO.GWU.EDU/EXPLOREELLIOTT



Be a part of the inner circle.

Insider is your all-access pass to *Foreign Policy*.
Get all of the benefits of your subscription, plus:

**Say hello to an
ad-free experience**

Focus on the
journalism on
ForeignPolicy.com —
and nothing else.

**Hear from
the experts**

Read exclusive
Q&A's driving
deeper into the
biggest headlines.

Go deeper

Access curated
reading lists
on specific
geopolitical
topics.

**FP is better
with friends**

Get a free gift
subscription to
share with anyone
you choose.

...and more benefits designed with you in mind.

JOIN THE CLUB [FOREIGNPOLICY.COM/INSIDER](https://foreignpolicy.com/insider)

REVIEW

Giant panda
Bao Li at the
Smithsonian's
National Zoo
in Washington
on Jan. 9.

Pandamonium

How the United States helped
create a truly political animal.

By Gloria Dickie

O

n a sunny day last October, Bao Li and Qing Bao arrived at the National Zoo in Washington. A 19-hour trans-Pacific flight aboard a FedEx cargo jet had ferried the 3-year-old pandas from their home in Sichuan, China, to U.S. soil, where they will spend the next decade of their lives.

The arrival of the two young bears merited a collective sigh of relief. After its three previous pandas were recalled to China in November 2023, the U.S. zoo had been without the bears for the first time in more than 20 years. A fraught relationship between the United States and China over trade, technology, and geopolitics made striking any new panda deal with the Asian superpower seem unlikely. The newcomers marked an unexpected diplomatic breakthrough.

Pandas have been China's friendship token of choice since the 1940s, when the country gifted the United States a pair of cubs as a symbol of thanks for U.S. support in its efforts against Japan. Two more panda envoys followed U.S. President Richard Nixon's historic 1972 Beijing visit, which normalized China-U.S. relations. Since then, China—the only nation with a wild panda population—has dispatched more than 60 pandas on loan to countries around the world, from Qatar to Russia.

How these bumbling bears came to play a persuasive role in diplomatic dealings rests on a formidable quest made by two U.S. explorers nearly a century ago. As journalist Nathalia Holt details in her new book, *The Beast in the Clouds*, a perilous but largely forgotten expedition through southern China would kick off a global panda craze, confirming the existence of an animal once believed to belong only to myth.

IN DECEMBER 1928, Ted and Kermit, two of former U.S. President Theodore Roosevelt's six children, traveled to China on an expedition sponsored by Chicago's Field Museum of Natural History. Their goal was to bring back the pelt of a black-and-white bear so rare that it would yield instant fame. At that point, "every large mammal on earth had been attained, and their bodies mounted in exhibits, except for one," Holt writes. So little was known about the panda that the Roosevelts were not sure where, precisely, to start. No one knew where the bear lived, what it ate, or how it behaved.

This would explain why the brothers, seeking to escape from under their father's shadow and bonding over a shared



Theodore Roosevelt Jr. and his guide Mohkta after the capture of a giant panda in China, circa 1928-29.

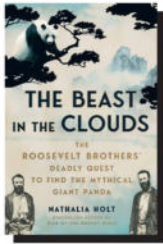
love of big-game hunting, spent so much time traversing the Himalayas, chasing ghosts and rumors. At the time, scientists had no reason to think that the bear—if it were indeed that—should not inhabit a land of snow and ice. After all, they reasoned, the panda shared half of its fur in common with the polar bear. Hunters and researchers also expected it to be extraordinarily aggressive. The bicolored bear, Holt writes, "offered the ultimate challenge: a large mammal so elusive that no one had documented one, as deadly as a polar bear and as threatening as a black bear, occupying a habitat that no one could predict."

Drawing on letters, expedition journals, interviews, and the Roosevelts' own book, *Trailing the Giant Panda*, Holt places the brothers' journey in a broader historical and political context that considers evolving views of conservation and hunting, the precipitous decline of the world's biodiversity over the past century, and the emergence of panda diplomacy.

Yet her narrative does not wander far from the trail itself, closely tracking the Roosevelts' plodding march from mountain towns plagued by opium addiction, through semiautonomous Tibetan kingdoms, and finally to a heart-wrenching crescendo in China's bamboo forests.

The brothers' arduous journey was made much less so by the local guides who "had to hike far ahead of the men, pounding down snow with their fists" to help make a trail. Other recent works on mountain exploration have attempted to give porters their due, such as Nandini Purandare and Deepa Balsavar's *Headstrap: Legends and Lore From the Climbing Sherpas of Darjeeling*, and Holt emphasizes the

The sleepy, ambling bear they had filled with bullets was not aggressive but "a gentleman," as Kermit Roosevelt would write.



The Beast in the Clouds: The Roosevelt Brothers' Deadly Quest to Find the Mythical Giant Panda

NATHALIA HOLT,
ATRIA/ONE SIGNAL
PUBLISHERS, 288 PP.,
\$29.99, JULY 2025

guides' back-breaking labor, as well as the work done by the Roosevelts' Chinese interpreter, Jack Young, who would go on to become an explorer in his own right.

Still, the privileged duo suffered through altitude sickness and freezing temperatures. They also grappled with dangerous bandits, deserting mules, and the mounting anxieties of failing to turn up a single panda during their struggles in the Himalayas. It would take the brothers nearly six months to find their black-and-white bounty in the country's bamboo forests, underscoring that the panda was every bit as rare a century ago as it is today, with fewer than 2,000 now thought to remain in the wilds of southwestern China. The brothers "constantly stopped and chatted with men and women in the villages and on the trail," Holt writes. "Every look was quizzical. No one had ever seen an animal like that before."

The panda evades both the brothers and readers in Holt's text, which prioritizes the action and adventure of the expedition. Few words are spared on the bear's plight until three-quarters into the book, when the brothers finally encounter their prize, pulling the trigger on what is now one of the world's most beloved creatures.

Hunting pandas is unimaginable by today's standards. It

was also unpalatable at the time, Holt reveals, as the Yi ethnic people encountered by the Roosevelt brothers refused to kill the bears—even when they rummaged through their apiaries. The Yi considered the panda a "supernatural being, a sort of demi-god," according to a guide's translation, and noted it was "not to be feared." This view is shared by a number of Indigenous cultures that see bears, generally, as magical creatures, shapeshifters, or deities, such as the Quechua culture of the Peruvian Andes, which holds the *ukuku*—a half-human, half-bear figure—as a demi-god, or the Japanese Ainu, who worship the bear as the head of the gods.

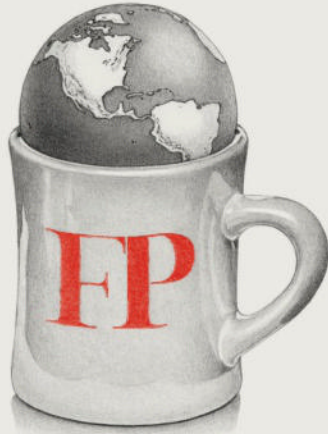
The brothers soon realized their mistake, admitting that the sleepy, ambling bear they had filled with bullets was not aggressive but "a gentleman," as Kermit would write in his field journal. "The dark reality of what their accomplishment would mean was a phantom darting in front of them, obscuring their vision, and as dangerous as a beast in the clouds," Holt writes. "They knew immediately, from the moment the panda fell, that they never wanted to hurt another of its kind."

China would ban all panda hunting in 1938, the first such protections offered to a trophy game animal. (Kermit himself lobbied Chinese diplomats to prohibit hunting in 1936.) Later, killing a panda could be enough to warrant the death penalty. In my own reporting, I found that in 1993, two men were handed death sentences in a southern China court for trafficking three panda pelts. Under China's current penal code, killing a panda warrants a lighter punishment—no less than 10 years' imprisonment.

Regardless, the Roosevelts' hunt had wrought a new future. In the wake of their successful return, more Westerners launched expeditions to China in hopes of capturing the



A girl sits in front of a display of mounted giant pandas at Chicago's Field Museum of Natural History in an undated photo.



Weekend

Grab a cup of coffee,
get comfortable,
and let FP help
you recharge from
the weekday grind.



**Stories on books, culture,
history, and more**
that take a step back
from the daily drumbeat
of news.

SIGN UP FOR THE NEWSLETTER AT
[FOREIGNPOLICY.COM/
WEEKEND](https://foreignpolicy.com/weekend)

elusive bear. Other writers, most notably Vicki Constantine Croke in *The Lady and the Panda*, have colorfully chronicled the efforts by New York socialite Ruth Harkness to bring the first live panda cub back to the United States in 1936. In turn, China also cracked down on the capture and export of its living pandas, cementing its monopoly of the bears.

ALTHOUGH HOLT'S CONCLUSION largely focuses on the complicated outcomes for the Roosevelt brothers, her vivid prose and knack for depicting the adrenaline of the journey bring to life a remarkable chapter of history that would go on to redefine the human relationship with the animal kingdom. If not for the brothers' expedition, China may never have realized what a powerful bargaining chip and soft-power tool it had at its disposal.

Some scholars say the world is now in a renewed flurry of panda diplomacy. There are around 20 loan agreements active around the world, according to Barbara K. Bodine, the director of Georgetown University's Institute for the Study of Diplomacy, and countries covet pandas not just for the animals themselves but for what they represent—good standing with China at a time when geopolitical alliances are fraught and uncertain.

Environmentalists would argue that the panda—a living animal—should not be exploited for political gain. But the animal's popularity means that China now spends hundreds of millions of dollars on panda conservation and has created a protected area three times the size of Yellowstone National Park to safeguard their survival. Would any of that have been possible if not for the Roosevelts' intrepid expedition? At the same time, China has put substantial resources into its captive panda breeding programs to guarantee a steady supply of soft power.

Holt's book only briefly tangles with the thorny issues of modern conservation, leaving readers to consider the lasting implications of the brothers' quest. But in unearthing the origin story of the international panda frenzy, Holt reveals how the United States helped create a truly political animal. ■

GLORIA DICKIE is a journalist based in Bangkok and the author of *Eight Bears: Mythic Past and Imperiled Future*.

Countries covet pandas not just for the animals themselves but for what they represent—good standing with China at a time when geopolitical alliances are fraught and uncertain.



A Post-Harvard World

Washington is ceding ground to Beijing on higher education.

By Howard W. French

Over the decades, Harvard University has become so prominent in American culture that it is easy to mistake it for the prototypical modern university. Founded in 1636, Harvard is older than the United States itself. Besides this, there are few, if any, universities in the world that have a lower acceptance rate or more distinguished faculty. And Harvard's \$53 billion endowment is larger than the GDP of nearly 100 countries.

Despite the institution's formidable reputation, though, and for all of U.S. President Donald Trump's fixation on bringing it to heel, the Harvard that the world thinks it knows is a surprisingly recent creation.

Even well into the 19th century, Harvard was a place of stultifying, rote-like instruction. As late as the mid-20th century, acceptance rates were higher than 50 percent. And though Harvard is being pilloried by the White House for its international student body and supposedly undue emphasis on diversity, it was overwhelmingly dominated by Anglo-Saxons, leery of Jewish applicants, and all but closed to African Americans for most of its history.

Students at Harvard University's Harry Elkins Widener Memorial Library in Cambridge, Massachusetts, circa 1960.

These details are all gleaned from *Empires of Ideas: Creating the Modern University From Germany to America to China* by William C. Kirby, a former dean of Harvard's Faculty of Arts and Sciences and former Harvard Business School professor. At the heart of Kirby's engrossing book, first published in 2022, is the idea that "an enduring[ly] rich country cannot have, as a rule, poor universities." And as the book suggests, nothing about Harvard's current preeminence—or that of the United States' world-leading university system—is a given.

The fact that Kirby's book was written before the full thrust of Trump's campaign against universities only serves to heighten a precarious sense of the United States' position in the world of higher learning. As the Trump administration escalates its efforts to exert unprecedented political control over Harvard, the question of whether the United States can sustain its national wealth and power has become an urgent one.

AS ITS TITLE SUGGESTS, Kirby's book traces the evolution of today's universities, from their start in Europe to their possible future, potentially dominated in the middle or even near term by China.

Europe invented the university as we know it. New institutions of learning arose first in cities such as Bologna, Oxford, Salamanca, and Paris and then spread throughout the continent before they were developed in the rest of the world. Of course, the distant roots of these universities lay in antiquity, particularly in Greece, and other parts of the globe have seen specialized centers of learning, including India, China, Persia, and the Arab world. Years ago, I visited Timbuktu, in present-day Mali, where an Islamic university flourished in the 14th and 15th centuries.

What Kirby considers the modern university, however, was born in Germany, with the University of Berlin setting a standard from the early 1800s that would not be matched globally until well into the following century. What made German universities, and Berlin in particular, special was that they discarded an older tradition of catering to *Brotstudium*, meaning careerists, or "bread students." The task of the university, they believed, should be the intellectual nurturing of the whole individual, rather than a narrow, purpose-shaped education. This was achieved, in part, by making the liberal arts the centerpiece of undergraduate learning.

Berlin had two other novel features. One was the marriage of research and instruction, or the requirement that faculty members not only teach but actively generate new knowledge within their fields. Before then, most professors had taught relatively fixed curricula, requiring that students master past learning.

The other stanchion of the Berlin model, and the one with the greatest resonance in the United States today, was political

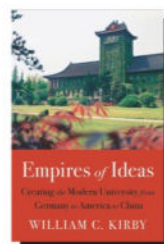
freedom and academic independence. "*Lehrfreiheit*, the freedom to teach, and *Lernfreiheit*, the freedom to learn, became fundamentally intertwined principles," Kirby writes. "The state's role with regard to the university was to protect its freedom, not to impede it."

With these pillars, Germany became home to the birth of modern scientific research in a university setting. Before the end of World War I, the country accounted for a third of Nobel Prize awards, half of those generated by the University of Berlin alone. As the late intellectual historian Christopher Lasch wrote, Germany "stood for nothing if not progress." In that prewar period, Kirby writes, there were "no comparable institutions in the United States, and access to British universities was severely restricted."

The rest of the world, especially U.S. higher education, began taking note. At Harvard in particular, strong German influences date back to the early 19th century, when the university sent a professor to Göttingen for advanced study before hiring him. This set an illustrious pattern followed by many U.S. scholars, including W.E.B. Du Bois, who completed advanced studies in Germany before returning for their doctorates at Harvard and teaching in the United States.

Under Charles William Eliot, the university's president from 1869 to 1909, Harvard began its transformation in earnest. At his inauguration, Eliot proclaimed a degree of ambition for Harvard that it has been associated with ever since, publicly vowing to improve the university's academic standing across all disciplines. He largely succeeded, in part by establishing a faculty of arts and sciences, authorizing the creation of academic departments, and allowing undergraduate students to take electives—all in emulation of the German model.

As U.S. higher education rose to global preeminence in the 20th century, German universities were increasingly subsumed in a national project seeking global power, and by World War II, they came under the near-total control of the Nazi state. This set them on a path of relative decline from which they have never fully recovered. U.S. higher education, meanwhile, benefited strongly from Germany's self-destruction, particularly the persecution of Jews. Intellectuals who fled into exile boosted American intellectual life from the sciences to the arts.



Empires of Ideas: Creating the Modern University From Germany to America to China

WILLIAM C. KIRBY, BELKNAP PRESS (AN IMPRINT OF HARVARD UNIVERSITY PRESS), 512 PP., \$24.95, MAY 2025, PAPERBACK



Nobel Prize winners, physicists, and other academics pose with Harvard University President James Bryant Conant (center, front) in Berkeley, California, on March 28, 1940.

THE MUTUAL DEPENDENCE between the United States' ascendant university system and the powerfully rising nation became fully evident as the 20th century progressed.

In Kirby's telling, it was James Bryant Conant, Harvard's president from 1933 to 1953, who set the university on a path to becoming a great research institution. At his inauguration, Conant declared, "If we have in each department of the university the most distinguished faculty which it is possible to obtain, we need have little worry about the future." Indeed. According to one study of academic rankings of graduate schools, between 1925 and 1982, no list placed Harvard lower than third-best in the country. At the 1958 World's Fair in Brussels, when visitors at the U.S. pavilion were polled on where they would like to send their son to college, twice as many named Harvard over the second-most popular choice, the Massachusetts Institute of Technology.

Beyond fostering intellectual leadership, Conant oversaw reforms of the undergraduate curriculum that instated general education requirements and sought to forge an "understanding of the society which [students] will possess in common." Discrimination against Jews remained, though, even as unofficial quotas limiting their enrollment were lifted under Conant's tenure, and African American enrollment continued to be extremely low.

During the Conant years, Harvard also threw itself enthusiastically into the U.S. war effort against Germany and Japan. Kirby writes that the university "came to be identified ever more closely with the American national mission."

For all of Conant's achievements, Kirby credits a much more recent president, Neil Rudenstine, with transforming Harvard into the seemingly omnipresent force in American society that it is today. During Rudenstine's tenure in the 1990s, Harvard quadrupled its endowment, which reached \$19.2 billion by the decade's end. The university leveraged this financial might to expand into areas neighboring Cambridge, Massachusetts, such as Allston, where it built new campuses and cutting-edge research facilities.

Toward the end of his tenure, Rudenstine visited China,

where Harvard has long been revered with special fervor. This was brought home to me years ago in Shanghai, when a teenager approached me on the street and asked what I did for a living. When I said I taught at Columbia University, she replied cuttingly, "Oh, Columbia is no Harvard."

While every president of Harvard since Rudenstine has visited China, and at least one has met with Chinese President Xi Jinping, the institution has followed its own path in navigating relations with the country. While some other leading U.S. universities have set up campuses in China, including Duke and New York University, Harvard has been content to cultivate a strong contingent of Chinese students in Cambridge, or what Kirby calls a "bottom-up" strategy.

Today, however, Harvard's fortunes, both at home and abroad, seem more imperiled than ever. Since his second term began, Trump has cut federal funding from Harvard and other universities, threatened institutions' accreditation, attacked academic independence and foreign enrollment, particularly of Chinese students, and increased taxes on endowments.

The Trump administration's justification for many of these measures has been its claim that U.S. campuses have become hotbeds of antisemitism since the spread of protests after Israel's military offensive in Gaza, brought on by Hamas's Oct. 7, 2023, attack. Yet many critics believe that the White House is wielding claims of antisemitism to advance a much broader conservative, or even authoritarian, political agenda.

As the Trump administration escalates its efforts to exert unprecedented political control over Harvard, the question of whether the United States can sustain its national wealth and power has become an urgent one.

The same can be said of Trump's frequent invocation of diversity policies as a social ill that must be rooted out.

These threats assail higher education from multiple directions. As large as some U.S. university endowments may seem, the vast majority of these funds can only be used for donor-specified purposes, whether that is building a new lab or paying for an endowed chair in a niche field. Unspecified or general funds are often used for tuition relief.

Even in Harvard's case, its endowment is woefully inadequate to replace federal research grants, which are fundamental to its world-leading work in science and medicine and its ability to recruit and retain sought-after faculty. Meanwhile, Trump's efforts to prevent Harvard from enrolling international students weaken the university's ability to draw from among the best applicants in the world. Harvard may win battles against the White House on the legal front or even cave to some of Trump's demands, but nothing is likely to prevent a vengeful Trump from continuing a campaign of harassing the university.

READING KIRBY'S HISTORY, one is left doubting whether the United States will be able to sustain its world-leading universities amid these attacks. Among other things, these actions will hurt the U.S. economy. For an administration that is preoccupied with trade imbalances, it has attached little importance to the earning power of higher education. In the 2023-24 academic year, international students contributed an estimated \$43.8 billion to the U.S. economy.

A further question arises that has received far too little public discussion: Isn't it the United States that benefits most by not just leading in education but having its ideas and ideals spread around the world by people who were fundamentally shaped by its universities?

The picture that Kirby paints of China's educational goals should give pause to those who wish to restrict funding to U.S. universities or otherwise clip their wings. Beijing is

The picture that Kirby paints of China's educational goals should give pause to those who wish to restrict funding to U.S. universities or otherwise clip their wings.

investing in higher education with a sense of purpose and on a scale and pace that exceed any crash program of national development ever seen before.

As Kirby states outright, in the 21st century, "it is China that has the greatest ambitions for higher education." From 1978 to 2020, China's university enrollment soared from roughly 800,000 students to more than 40 million. In 1999, only 3 percent of Chinese people attended university; today, that figure has risen to more than 50 percent. Meanwhile, more international students have started flocking to China. From 2013 to 2018—the year with the most recently available statistics—the number of individuals from African countries studying in China more than doubled, reaching 81,000. This growth is reflected in students from other regions as well.

China's ambitions don't end with quantity. In 2008, according to one international ranking, no Chinese institution was among the world's top 200 universities. Just 10 years later, three made the top 100. Two of them, Tsinghua and Peking universities, placed in the top 25 in 2021, with Tsinghua outranking all but two Ivy League schools. Beijing has assessed that 42 Chinese universities are "well on their way" to becoming or "have the potential" to become world-class universities.

The Chinese government speaks openly of education being the "cornerstone of national rejuvenation." And for the most part, Kirby writes, its model has been the U.S. university system, which succeeded Germany's a century ago as the world's greatest. Still, Chinese universities are under far more direct control of the government than U.S. and other Western universities. This influences which topics can be researched and discussed, as well as the questions that can be asked and how they must be answered.

Given this, it remains an open question whether China can fully succeed without providing its universities much more academic freedom and becoming a true center of global learning, one open to the world and its ideas. Regardless, the United States seems to be stumbling in the other direction, openly plotting the destruction of what has been a key source of its vitality for the past century. ■

HOWARD W. FRENCH is a professor at the Columbia Journalism School and columnist at **FOREIGN POLICY**.



Demonstrators hold signs in support of Gaza during Harvard's graduation ceremony in Cambridge on May 23, 2024.



How China Captured Apple

A giant firm and a superpower
have become deeply entangled.

By Bob Davis

In the early 1990s, Apple was determined to show it could continue to build computers in the United States as part of its strategy of keeping tight control over every aspect of design and production. Macintosh computers rolled off the line at one Apple factory “like a Holiday Inn toaster turns out toasted bagels,” according to Brent Schlender and Rick Tetzeli’s biography of Steve Jobs.

But facing bankruptcy in 1996, the company sold its Mac factory in Colorado to a U.S. contract manufacturer and started down a long road of outsourcing manufacturing, first in the United States and later in Asia. It now builds most everything it sells in China. Outsourcing has been incredibly lucrative for Apple, helping to make it one of the three-most valuable companies in the world, as measured by market capitalization. But it also has made Apple frighteningly dependent on the shifting whims of Chinese politics and the priorities of Chinese President Xi Jinping.

Apple in China, by former *Financial Times* reporter Patrick McGee, who has long covered the company, tells the tale of this Faustian bargain in bold, vivid strokes. It’s a great read and an informative guide to how Apple and China truly

A man wearing an Apple Vision Pro headset records footage as people wait to enter an Apple Store in Beijing on June 28, 2024.

operate—one that global leaders (and Silicon Valley bigwigs) should pay heed to.

“It would be banal to say that Apple wouldn’t be Apple today without China,” McGee writes. “What this book contends is more intriguing—that China wouldn’t be China today without Apple.” Hyperbolic to be sure, but McGee makes his case convincingly.

The secret sauce to Apple’s outsourcing is what McGee calls the “Apple Squeeze.” To make sure foreign factories can meet Apple’s exacting standards, Apple flies in its engineers to “rigorously train local partners” in how to mass-produce new technology items at low prices, “in the process giving away manufacturing knowledge.” In exchange, contractors charge Apple lowball prices and operate at the thinnest of margins or sometimes for no profit at all.

As demanding as Apple is, it has plenty of suitors. Contractors know they can use the knowledge and prominence they gain from working with Apple to win contracts from other companies willing to pay higher prices. Beijing encourages Chinese firms to work with Apple, McGee argues, because it understands that Apple is providing a massive transfer of manufacturing knowhow. Over the years, Apple has trained a huge cadre of Chinese engineers and managers, and its contractors have employed millions of Chinese workers.

McGee calls Apple “the world’s largest manufacturer without owning factories.”

A couple of caveats before we continue: *Apple in China* tells the Apple story as a heroic tale. McGee describes the celebrated CEOs—Apple’s Steve Jobs and Tim Cook and Foxconn’s Terry Gou—as brilliant and demanding and their underlings as perfectionist and hard-driving. If any of them have faults, it’s arrogance and ignoring their families. This sometimes gets to be too much, like listening to a person who says his biggest flaw is that he works too hard.

There also isn’t a word in the book about how Apple and its Silicon Valley compadres that shed factory jobs in the United States contributed to the shock of soaring Chinese imports. McGee is nearly as silent about the horrendous working conditions at some of Apple’s China suppliers. For instance, he chides journalists for focusing too much on suicides at Foxconn, Apple’s biggest contract supplier in China, and missing the bigger story of Apple’s progress in China.

“Periodic exposes helped to shine a light on working conditions and likely caused some positive change,” he writes. “But the media’s forays into what Apple was up to overlooked wider questions of company strategy, business development, and the management of product cycles.”

Still, the story McGee does tell—Apple’s growth in China and its impact on the country—he tells well. He manages to turn supply chain decisions into high drama and make injection molding seem sexy.

Starting in the mid-1980s, Apple experimented with foreign contract manufacturing. It turned to Canon in Japan to produce its first laser printer, the LaserWriter. Japanese firms also produced some Apple laptops and the Newton, a disaster of a product that used a stylus to take notes and send emails.

It wasn’t until Apple lurched toward bankruptcy in the mid-1990s that it turned fully to outsourcing. It dabbled with manufacturing in South Korea, Singapore, Ireland, Wales, and Mexico. But it hit paydirt in Taiwan with Foxconn, whose CEO, Gou, was as obsessive and perfectionist as Jobs.

But Taiwan’s worker population was limited, as was its space for expansion. Gou, a leader in the generation of Taiwanese CEOs who invested heavily in China, shifted Apple production to China. There, the working population seemed unlimited, and the government offered subsidies, infrastructure, and the necessary working conditions for success—meaning that it cracked down on independent worker associations and turned a blind eye to child labor and scandalous overtime demands. Apple consolidated its manufacturing, which had been spread all over Asia, in China.

A huge, cheap labor pool was crucial. The work was so tedious and competition for labor so intense that turnover in electronics contract manufacturers could reach 300 percent to 400 percent annually.

Of course, many other Western companies were lured to China along with Apple, often in joint venture arrangements, which became a way for local partners to purloin Western technology. Apple worked hard to avoid that trap.

In California, Apple designers came up with innovative products, such as the iPod and iPhone, that didn’t use off-the-shelf parts. Apple trained local firms to produce advanced components at scale and for a low price but also limited their ability to copy Apple products. One way was by purchasing the expensive computerized machinery necessary to make Apple products for contract manufacturers—and making sure the manufacturers used them only for Apple.

Apple’s engineers tried to imbue Chinese manufacturers with Apple’s perfectionism while protecting its intellectual property. “Instead of selecting components off the shelf,” McGee writes, “Apple was designing custom parts, crafting the manufacturing behind them, and orchestrating their assembly into enormously complex systems” that were

Apple’s engineers tried to imbue Chinese manufacturers with Apple’s perfectionism while protecting its intellectual property.



Left: An employee works on an iMac at an Apple factory in Sacramento, California, on May 24, 1999.
Right: Chinese workers inspect a cheaper, local alternative to the Apple Watch at a factory in Shenzhen on April 22, 2015.

difficult to replicate. The idea, McGee says, was to “build moats around its manufacturing innovations.”

When it came to dealing with China’s complex political system, Apple initially relied on Gou, or Uncle Terry, as he was known in Apple. Gou understood how Beijing operated and was a pro at scoring the free land, infrastructure, and other subsidies that local governments gave to manufacturers. Officials’ careers benefited from factories that hired loads of local workers and furthered the central government’s goal of improving electronics manufacturing. Pleasing Beijing meant promotions for the local officials Gou wooed.

But by around 2013, Apple had gotten so big in China that it started to attract unwanted attention and was sometimes portrayed in the local media as a bullying Western company, particularly as China’s new leader, Xi, consolidated power and U.S.-China relations began to crater. Apple assembled what it called the “Gang of Eight”—managers with China experience—to try to manage dicey political relations. They learned the difference between the Western notion of “rule of law,” where courts are supposed to deal out verdicts impartially, and the Chinese practice of “rule by law,” where the Communist Party sets the rules, McGee shows. As party leaders see it, it’s their law, and they rule.

Apple’s enormous reliance on China for manufacturing, which had fattened its bottom line, had begun to become a weakness it had to address. Apple tried a variety of tactics.

When Beijing asked Apple to remove apps from its Chinese App Store, Apple dropped the *New York Times* and 674 different VPN apps that had enabled Chinese users to jump the Great Firewall and download banned content. But Apple wouldn’t go so far as to ban the *Times* from its global App Store, as China requested.

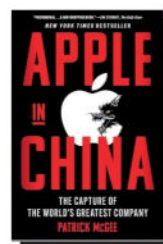
Apple also invested in Chinese companies that it thought were favored by the government, including the ride-sharing company DiDi Chuxing and chipmaker YMTC. It chose

impoverished Guizhou province for a new data center because it bet the governor there would be appointed to the Politburo Standing Committee. (He wasn’t, and Apple dropped the project in 2022.)

It also started shifting away from Taiwanese-owned manufacturers to Chinese-owned ones, creating what McGee calls a “red supply chain.” Meanwhile, in meetings with Chinese officials, Apple executives stressed how the company was transferring manufacturing technology to China and that it was investing \$55 billion annually in the country and in 2016 told Chinese officials it planned to spend \$275 billion over five years, although McGee doesn’t clearly explain how it arrived at those numbers.

Apple sought to show it was in lockstep with Xi’s vision of turning China into a technology superpower. “The technology transfer that Apple facilitated made it the biggest corporate supporter of Made in China 2025,” Beijing’s plan to make China a global leader in crucial technologies, McGee writes.

How did Apple manage to do all this without becoming a pariah in Washington? Sadly, McGee has little to contribute on that end. He notes that Cook met fairly regularly with President Donald Trump during his first term, but he doesn’t have details on what they discussed. Apple products were among those exempted from tariffs during Trump’s first trade war with China. Coincidence? The reader is left to wonder.



*Apple in China:
The Capture of the
World’s Greatest
Company*

PATRICK MCGEE,
SCRIBNER,
448 PP., \$32, MAY 2025

Trump 1.0 also did Apple a huge favor by barring exports of advanced semiconductors to Apple's most formidable Chinese competitor, Huawei. For a time, Huawei's revenues plummeted, although it has recovered since then. Was Apple simply a lucky bystander to Washington's crackdown, or did Cook push Trump in that direction? McGee leans toward the former explanation, but given that Cook appears to leave nothing to chance, that seems unlikely.

Another Apple priority was reducing its reliance on chips produced in Taiwan by Taiwan Semiconductor Manufacturing Co. (TSMC). From my own reporting, I know that Apple was pushing TSMC to bring some of its manufacturing to the United States, which it is in the process of doing after the United States awarded it billions of dollars in subsidies through the CHIPS and Science Act.

Of course, the book was finished before Trump's latest trade war, so it doesn't tackle recent events. Apple products, like other electronic goods, were exempted from most of the super-high tariffs Trump levied on Beijing, which recently were paused for 90 days. Now Cook is trying to win favor in Washington in the same way he did in Beijing, with a promise to spend huge amounts in the country. Apple has pledged to spend \$500 billion domestically over the next four years of Trump's presidency, which includes orders it doles out to U.S. suppliers.

But Trump might be tougher to lobby than Xi. In May, Trump threatened to hit Apple with at least 25 percent tariffs on any iPhones produced outside the United States, no matter the country, even though building them domestically would be far more costly and increase iPhone prices.

For all of Apple's technological skill and political acumen, it now finds itself utterly reliant on China at a time when U.S.-China relations have become frigid and may have already descended into a new cold war. Apple is looking to invest

For all of Apple's technological skill and political acumen, it now finds itself utterly reliant on China at a time when U.S.-China relations have become frigid and may have already descended into a new cold war.

more in India to diversify production, McGee points out, but that's a long-term project—if it succeeds at all.

Even if more final assembly is done in India, much of the innards still come from China, where competitors now produce phones comparable to Apple's. And Apple's unique way of controlling outsourced manufacturing, especially buying the production machinery for contractors, means that scaling up production in India could cost it hundreds of billions of dollars.

Then there is the question of whether China would let Apple leave. Beijing has so many levers it can pull—anti-trust investigations, regulatory problems, shipping delays, and so on—that Apple might feel that the cost is too high to alienate Beijing.

As Doug Guthrie, one of the Apple Gang of Eight, wrote after he left the company: "Quite simply, you don't get to do business in China today without doing what the Chinese government wants you to do. Period. No one is immune. No one." ■

BOB DAVIS is a writer on U.S.-China economic relations and co-author of *Superpower Showdown: How the Battle Between Trump and Xi Threatens a New Cold War*.

People dressed as Foxconn workers take part in a protest against the Taiwanese technology giant, which manufactures Apple products in China, outside an Apple outlet in Hong Kong on May 7, 2011.



ANTHONY DICKSON/AFP VIA GETTY IMAGES



Yoko Tawada
in 2022.

Beyond the Mother Tongue

Yoko Tawada's quietly
radical theory of literature.
By Rhoda Feng

“I was born into Japanese the way one is thrown into a sack,” the Japanese German writer Yoko Tawada wrote in 2002. “That is why this language became for me my exterior skin. The German language, on the other hand, I swallowed whole, and it has been sitting in my stomach ever since.”

If these metaphors at first suggest a linguistic hierarchy, Tawada went on to neatly refute the idea in a 2004 interview. Her native language is as intimate and impossible to slough off as her skin; a second language, by contrast, is consciously consumed: chewed, tasted, metabolized. Some foreign words, she noted, resist digestion entirely;

they lodge uncomfortably in the throat or belly, unassimilated. Others transform into “meat” and eventually become part of her flesh.

The dance between the familiar and unfamiliar has been a running theme in Tawada’s work. In her fiction, written in both Japanese and German, she enacts a kind of deliberate estrangement, staging encounters between her narrators and the world around them that force both reader and character to see the familiar anew. In her short story “The Talisman,” a woman misreads earrings as protective amulets. In “The Man With Two Mouths,” a group of Japanese tourists meet a German trickster, whose bilingual puns and feats of ventriloquism both amuse and baffle them.

In Tawada’s universe, misreading is not necessarily a failure—it is a generative act, a way of showing that the link between word and meaning, between sign and signifier, is always being negotiated. In her newly translated essay collection, *Exophony*, Tawada turns the instability of meaning into a mode of inquiry. The book charts her encounters with language not as a fixed system but as a shifting terrain—where miscommunication can be illuminating and where the boundaries between languages are always in flux.

“Maybe what I really want is not to be a writer of this or that language in particular, but to fall into the poetic ravine between them,” she reflects in *Exophony*. The book is situated in that ravine. It’s an exploration of what it means to live between languages, in a place where speech and notions of selfhood are allowed to stutter, multiply, and resist coherence.

FIRST PUBLISHED IN JAPANESE in 2003, *Exophony* raises a question in its opening chapter: “What happens when you step outside the cocoon of your own mother tongue?” Tawada doesn’t offer a neat answer. Instead, she sketches a world in which language behaves unpredictably—where vocabulary slides across political boundaries and where grammar, rather than organizing the world, reveals its fault lines.

In *Exophony*, Tawada is a travel writer of language itself. She is not chronicling cities, monuments, or cuisines so much as excavating the codes and conventions—spoken and unspoken—that define the contours of linguistic belonging. If traditional travel writing charts spatial displacements, Tawada’s genre-bending essays illuminate how speaking (or refusing to speak) a language shifts one’s position in the cultural cosmos.

The bulk of *Exophony* is structured as a loose itinerary, with chapters named after cities—Dakar, Berlin, Los Angeles, Seoul, Vienna—but each place is treated less as a location with precise geographical coordinates than a linguistic microclimate.

In Dakar, where Tawada traveled for a literary conference

in 2002, she encounters the phrase “exophonic writer” for the first time. It connotes not simply writing in a second language but a mode of consciousness that thrives outside the jurisdiction of the mother tongue. Hearing it, the term clicks into place for Tawada not as a label but as a compass. “The exophonic is an adventurous concept, brimming with curiosity,” she writes. So too is this book: Its chapters meander, accumulate sediment, double back on themselves like rivers reconsidering their banks.

Tawada’s prose—translated with sensitivity by Lisa Hofmann-Kuroda—is both reflective and serrated, with sudden pivots from the anecdotal to the philosophical. Tawada can move from linguistic theory to an anecdote about translating a menu in Dakar and maintain the same lightness of touch. She will quote Paul Celan, the German-language poet she most admires, and later recount mishearing a phrase on a train.

In Seoul, Tawada observes that the lingering effects of Japan’s colonial past still shape cultural and linguistic exchange—or rather, the lack of exchange. “If Japan hadn’t committed war crimes against Korea—or had at least taken responsibility for them—perhaps linguistic exchange would feel more possible,” she writes. That sentence, simple and unadorned, contains an entire ethic of speech.

Again and again, she resists the assumption that language is a neutral vessel of selfhood, refusing to entertain essentialist questions about language and identity. People often ask her what language she dreams in—as if that



Tawada's personal papers.

Again and again, Tawada resists the assumption that language is a neutral vessel of selfhood, refusing to entertain essentialist questions about language and identity.



*Exophony:
Voyages Outside
the Mother Tongue*

YOKO TAWADA,
TRANS. LISA
HOFMANN-KURODA,
NEW DIRECTIONS, 192
PP., \$16.95, JUNE 2025

would unlock her “true” self. She bristles. “Implicit in the question is the assumption that it’s impossible for people to truly speak two languages,” she writes. The dream question isn’t about dreams at all; it’s about classification. Tawada, predictably, declines to be classified.

Likewise, she dismantles the myths of the native speaker as an arbiter and the mother tongue as a kind of epistemological homeland. “Nothing good can come from a predetermined sense of community,” she warns. “I want to believe that living means creating new communities wherever we happen to be, using the power of language.” What emerges in her considered essays is a notion of language as something migratory, a flock of birds refusing to nest.

Yet Tawada is too subtle a thinker to fall into easy romanticism about linguistic displacement. She moved to Germany in her early 20s to work for a book distributor after graduating from Waseda University. Her crossing into another language was voluntary—unlike the paths of those forced into exophony by war, colonialism, or exile. “People have no right to proselytize about the joys of exophony if they have never been forced to speak in a language not their own,” she reminds us, carefully situating her own linguistic dislocation within larger structures of power.

In Senegal, she reflects on how many writers, though raised speaking Wolof, had long written in French—a legacy of colonial education and literary tradition. But she notes a generational shift: Rather than returning to Wolof alone, some writers were now choosing English, embracing its global reach not out of affinity but as a strategic foray into a new linguistic domain. “These writers were choosing to assert their independence not by reaching for the past and their roots, but by taking a leap into a completely different, faraway world,” Tawada observes.

TAWADA IS NOT ALONE in challenging the primacy of the “original” language in literary production. In 2022, the Nobel Prize-winning South African novelist J.M. Coetzee published *El Polaco* (*The Pole*) in Argentina, in a Spanish translation by Mariana Dimópulos—before the English edition appeared, though the book was originally written in English. Coetzee framed the move as a revolt against the “cultural gatekeepers”

of the Northern Hemisphere who assume that literary value flows from the center to periphery.

While publishers have still relied on the English version of *El Polaco* to anchor their translations, Coetzee has emphasized the importance of the Spanish version and hinted that it may more fully reflect the novel’s final form. His publishing maneuver unsettles not just the norms of translation but the deeply held belief that a text is only fully itself in its supposed “native” language.

That belief is also the target of Coetzee’s more recent reflections in *Speaking in Tongues*, a book-length conversation between him and Dimópulos published this year. Like Tawada, he questions the premise that language is a stable container for thought or identity, recognizing its susceptibility to power, geography, and historical weight. In what Coetzee describes as his “rootless” English—a language stripped of idiom and national flavor, “divorced from any sociocultural home”—there is an echo of Tawada’s desire to write in the interval between two or more languages.

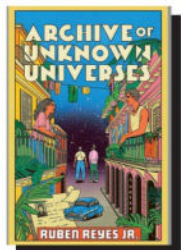
But where Coetzee speaks of the language he deploys in *The Pole* as “starved ... of what I think of as native nutrients,” Tawada embraces language’s deficiencies, its opacities, as sites of poetic possibility. Far from seeking to neutralize language or pare it back to a purified essence, she seeks to layer it, to magnify its aberrations. This is not the subtraction of the “native” but a reimagining of nativeness itself. The writer “always needs to be foreign, even in their own country,” Tawada said in a 2009 interview, so as to remain capable of “not taking things for granted.” *Exophony* dramatizes this idea well—that foreignness is not simply a geographical condition but a literary ethic: a way of staying alert to how things might be otherwise.

Tawada never presents *Exophony* as a manifesto, yet in its collisions of anecdote, history, and linguistic inquiry, it advances a quietly radical theory of literature. Tawada’s essays unfold like tidepools—shallow at first glance but teeming with unpredictable life. She understands that language carries with it layered histories and unconscious allegiances but also that it is always slipping out from under us.

In writing from the “poetic ravine”—between nations, scripts, and grammatical systems—Tawada doesn’t seek to reconcile these tensions but to cultivate them. Her vision of world literature is not a flattening of difference into a marketable whole but a practice of making visible the instabilities that readers are usually trained to ignore. It’s a useful estrangement—one predicated on the ways that language seduces us, betrays us, and occasionally makes us legible to one another, if only briefly and never without cost. ■

RHODA FENG is a freelance writer in Washington, D.C.

Global Fiction



Archive of Unknown Universes: A Novel

RUBEN REYES JR. (MARINER BOOKS,
288 PP., \$28, JULY 2025)

IT IS HARD TO IMAGINE a story more deftly engaged with the political themes of our time than *Archive of Unknown Universes*. In his debut novel, Salvadoran American author Ruben Reyes Jr. sends his characters on an adventure through a quasi-multiverse to explore alternate outcomes of El Salvador's 1972-92 civil war—a conflict that had implications for the entire Western Hemisphere.

The story begins in 2018. Its protagonists are Ana and Luis, two Salvadoran American students at Harvard University who are dating. Despite trouble in their relationship, Luis travels with Ana to Havana, where she is due to conduct archival research on the Salvadoran Civil War. (The Cuban government aided El Salvador's leftist rebels.) Ana is “after dignity for a tiny country, a forgotten country, a country conveniently erased from the map.” Luis has a “suspicion that the trip was a last-ditch attempt to save a relationship on the rocks.”

Although she is a diligent researcher, Ana is enamored by a fictional device known as the Defractor, which allows users to render different versions of their lives. The Defractor is experimental technology, still housed mostly in university libraries for academic use, but the “overeager American tech sector” seeks to “make it a hot consumer product, regulation-free.” Debates over the Defractor have obvious parallels to artificial intelligence. “Scrolling the internet without seeing an article about the Defractor was impossible,” Reyes writes; some people “saw the technology as a one-stop solution for all their personal problems.”

The Defractor lends the story an element of magical realism, a literary tradition with strong roots in Latin America. When Ana peeks into a Defractor at the University of Havana, she deviates from her research questions to ask whether her relationship with Luis has a future. In one Defractor-generated reality, she sees herself with another partner.

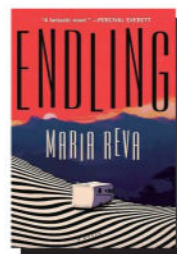
Ana becomes convinced that “the mystery man, her other boyfriend, held some sort of answer” to lingering questions about her family history. (Both Ana's and Luis's mothers fled El Salvador during the war.)

The Defractor rips the novel's plot in two. In the first universe—the known universe—U.S. President Ronald Reagan funnels “millions of dollars in guns, ammunition, and military training into El Salvador,” and the leftist rebels lose. In the second universe, the “Salvadoran Revolution” succeeds because the United States does not intervene. El Salvador becomes a communist success story akin to Cuba.

Reyes weaves both universes together to reveal long-buried secrets. Ana and Luis's fraying bond is contrasted with an intense historical gay romance, condemned “no matter which way the war shifted.”

It is hard to read *Archive of Unknown Universes* without thinking of El Salvador's current president, Nayib Bukele, who has fashioned himself into a global right-wing icon and vociferous proponent of mass incarceration. Reyes was strategic in setting his novel before Bukele came to power in 2019. Bukele has transformed El Salvador, whitewashing authoritarian abuses with flashy tourism campaigns and social media stunts. His ascent could have disrupted the cadence of the novel's first universe.

But the fictional communist Salvadoran government and Bukele share some key traits. “Ana had read enough to know that aesthetic maintenance was the government's shield against the world,” she reflects while visiting communist San Salvador. “The capitol was beautiful, but beauty was not justice.” Certain outcomes remain the same across all universes.—Allison Meakem, associate editor



Endling: A Novel

MARIA REVA (DOUBLEDAY, 352 PP., \$28, JUNE 2025)

THE FIRST TIME THAT Ukrainian Canadian author Maria Reva tried to write *Endling* was a bust. She already felt uneasy about the premise, which featured two tired Ukrainian tropes: mail-order brides and topless female protesters. Then Feb. 24, 2022, arrived, and Russia's full-scale invasion of her birth country made those subjects feel resolutely off-limits. So Reva shelved it.

Luckily for readers, after some time, Reva returned to her debut novel—with more than a few metafictional and auto-fictional tweaks—and the result is nothing short of brilliance. *Endling*'s main storyline centers largely on Yeva, a loner scientist who funds her work rescuing rare snails from the brink of extinction by entertaining Western men on guided romance tours. (Her job is not to marry them but to be the “shimmering bait” and “keep the bride-to-bachelor ratio high.”)

The snails under Yeva's care aren't particularly colorful or glamorous, but she's drawn to these oft-ignored “humble victims of the Earth's sixth mass extinction” that can hardly compete for sympathy with, say, the majestic northern white rhinos, the “belles of the extinction ball.”

Egged on by a pair of sisters who were raised by a famous feminist activist, Yeva agrees to use her mobile lab to kidnap 12 of the bachelors. (They settle for a “Last Supper size” of captives after Yeva shuts down the initial ambition of squeezing 100 of them into the trailer.) Once the women hit the road—bachelors and one last-of-its-kind snail in tow—the invasion begins, derailing their carefully planned plot and that of the novel itself. In a sense, the novel ends and restarts a third of the way through, its timeline colliding with our own, the one where bombings are “looping infinitely” on our screens.

It's an ambitious ploy that pays off handsomely. “A lot of writers now are grappling with how to write fiction in such a rapidly changing world. Much like the World Wars changed the course of art and thinking about art,” Reva recently told the *Rumpus*. “I think the novel is itching to be ripped apart again.” Her solution in *Endling*—to insert herself, or at least a character with her name, into the middle of the story—allows her to probe anew the role and ethics of storytelling in the face of great catastrophe. The result is a formally daring and wickedly funny novel that serves as a reminder of the possibilities, and necessity, of fiction.—*Chloe Hadavas, senior editor*



The Tiny Things Are Heavier: A Novel

ESTHER IFESINACHI OKONKWO (BLOOMSBURY, 288 PP., \$28.99, JUNE 2025)

FROM ITS FIRST FEW PAGES, it would be easy to assume that *The Tiny Things Are Heavier* is yet another installment in the literary canon of dark academia. But although Nigerian writer Esther Ifesinachi Okonkwo's debut novel partially takes place on a U.S. campus, it transcends the boundaries of the university—and the United States—to ask painful questions about universal themes, such as human dignity and the limits of family loyalty.

The Tiny Things Are Heavier begins at a small airport in an Iowa town. Sommy, a 20-something Nigerian woman, has arrived in the United States to pursue a graduate degree in literature at the fictional James Crowley University. She struggles to integrate into her new surroundings, burdened by what she left behind in Lagos.

Shortly before Sommy's departure, her older brother Mezie attempted suicide. Mezie had dreamed of a life in the United States, studying hard in pursuit of that goal: “He'd always clutched the American dream to his chest.” But when Mezie failed to get accepted to a U.S. college, he moved instead to Norway. He was ultimately deported back to Nigeria, and then came his overdose.

In Iowa, Sommy feels as if she is living a life that should have been Mezie's—and is weighed down by “the guilt of leaving him behind” in his moment of need. Feeling adrift, Sommy starts dating Bryan, an American student who she learns is half Nigerian.

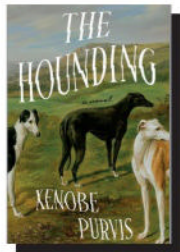
Bryan does not know much about his Nigerian father, who left the United States when he was a baby. But he is taken by Sommy and “her tales about Lagos, the people, the traffic, the hustle and bustle.” Bryan is also pleased to discover that they are both Igbo. Sommy sometimes wonders whether his “desire to know his father” is “the *why* of their relationship.” Over summer break, the pair decide to visit Nigeria so that Bryan can try to track down his dad. There, the novel turns from campus romance to international thriller.

In Lagos, Sommy reconnects with Mezie, only to find that their relationship has become irreparably tense; Bryan and Mezie don't get along, either. Bryan's attempt to identify his father, meanwhile, leaves him reeling. Also in the mix are Mezie's visiting Norwegian girlfriend; Mezie's ex-girlfriend, who seems determined to stir up drama; and Sommy and Mezie's parents, who are “pretending like everything is fine” amid Mezie's mental health crisis.

Hostility pulsates among all the characters—whether they are arguing about race, money, or love. Sommy's mother is “quick to dish out cruelty,” while Mezie has a “dangerous ability to ... unleash pain on women.” These enmities peak when the characters become involved in a shocking crime. How they each address their culpability sets the tone for the rest of the novel. They must weigh the pursuit of justice

against the protection of family and reverence for a flawed homeland against romantic love.

In tracing each character's response to the crime, Okonkwo exposes uncomfortable sticking points in transnational identity and class, demonstrating how retrograde instincts often prevail in times of despair. "The truth," Okonkwo writes, "is that we are all drawn to the familiar, whether or not we like it."—AM



The Hounding: A Novel

XENOBE PURVIS (HENRY HOLT AND CO.,
240 PP., \$26.99, AUGUST 2025)

IN 1701, A PHYSICIAN wrote a letter to the editor in *Philosophical Transactions of the Royal Society* recounting a rumor that young girls in Oxfordshire had been "seized with frequent barking in the manner of dogs."

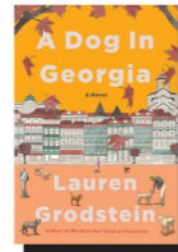
The tale that British author Xenobe Purvis weaves in her debut novel from this single line is just as elusive as the anecdote itself. Told through a rotating cast of locals, *The Hounding* recounts a summer in the village of Little Nettlebed, whose inhabitants—increasingly agitated by a harsh drought—become convinced that the five unruly daughters in the Mansfield family are turning into dogs.

The Hounding is a paean to girlhood and a consummate summer tale, full of halcyon days in the Mansfield family's orchard. (Summer, after all, is "the season of strangeness," one narrator remarks. "It was the heat that did it. It addled people's minds.") It follows a storied literary tradition of sisters as an endless source of fascination for the young men next door, from Laurie in *Little Women* to the anonymous neighbor boys of *The Virgin Suicides*. One young man, enraptured by the Mansfield girls' "rich tapestry" of sisterhood, attempts to decode their language: "Early on, he'd tried to make a glossary in his mind; he noted each hair toss, each playful pinch, each sigh. But the list was too long, the meanings too subtle."

Purvis is attuned above all to the slipperiness of truth and the potential for hearsay to rend apart a community, especially one primed to believe the worst of its outcasts. When the baker's wife recounts the rumor about the girls, there was "something irresistible in it, like sweet cakes or

marchpane." Even the more sensible villagers, "the ones who urged caution as the story spread, looked within their hearts and found there a dark mistrust of the Mansfields."

It's a beguiling tale, if one that occasionally slips into platitude. (The publican's wife, for instance, bemoans "the great, gruelling trial of being a woman in a world governed by men. How painful it was, and how humiliating.") And Purvis makes clear from the onset that the locals' growing ire at the Mansfield girls cannot be divorced from the relentless dry spell in the village and the burdens it places on their livelihoods. In our age of climate catastrophe, *The Hounding* serves as an unsettling reminder of who is made to pay when "all sorts of ordinary things" go wrong.—CH



A Dog in Georgia: A Novel

LAUREN GRODSTEIN (ALGONQUIN BOOKS,
304 PP., \$29, AUGUST 2025)

TBILISI, GEORGIA, is not the most obvious getaway destination for an American woman in the throes of a midlife crisis. But it is where the protagonist of Lauren Grodstein's latest novel, *A Dog in Georgia*, chooses to escape her uneasy existence in New York.

One morning, 46-year-old Amy Webb wakes to discover texts on her husband's phone that all but suggest he is cheating on her (again). The revelation comes just as Amy feels especially aimless in her career and family life. Trained as a cook, she married into wealth and hasn't worked a line job in years. And although she is a dutiful stepmom to her husband's son, he is now off studying at Cornell University and thriving on his own.

Whenever Amy enters an anxious spiral, she watches animal videos on YouTube. Her "truest companions had been animals," Grodstein writes—Amy previously worked at shelters—and her Manhattan apartment brims with a "menagerie" of cats and dogs. Amy is obsessed with one particular video of a stray dog in Tbilisi named Angel, who "was famous for walking kids across the street to school." After Angel disappears, Amy decides to fly to Tbilisi and try to find the dog herself.

That is how a well-intentioned American woman with scant international experience is plopped into a geopolitical

REVIEW

firestorm that she is entirely unprepared for. Although Tbilisi is home to 46,000 stray dogs, per Grodstein's count, Amy discovers that Georgia is facing much more serious problems than a missing pooch. "Georgians hate the Russians ... because they've been staging this low-key invasion since 2008, not like what they're doing in Ukraine but still bad," Amy tells her stepson over the phone. The main suspects in Angel's disappearance, Amy learns, are "hoodlums, vandals, Russians, Russians."

Amy's hunt for Angel occurs in the spring of 2024, as Georgia was embroiled in at times violent protests against a Russian-inspired "foreign agents" law. *A Dog in Georgia* is part lighthearted animal novel and part post-Soviet politics 101. The narrative is smile-inducing even as it toggles from terriers to tear gas. In addition to dogs—so many dogs—Amy meets a diverse cast of human characters, including "three post-Soviet grandmothers," a punk teenager, and a Russian draft dodger. The result is a novel that remains deeply funny even as it explores some of the darkest days in recent Caucasus history.

Grodstein rejects the simple binaries that so often define Western writing about the former Soviet Union. Amy has profound reflections on how she, as an American, is perceived abroad. (She is immediately recognized as such because she has "clear skin and beautiful teeth," a Georgian tells her.)

Amid the protests in Tbilisi, Amy praises U.S. democracy but is ill-prepared to deal with a skeptical Georgian's line of questioning about the "thing where the person who gets the most votes in the United States doesn't always win." When Amy asks a British expat why Russia is hungry for influence in Georgia, he responds forcefully: "Surely you know that no other country in the history of the world has dominated every facet of the global order the way that the United States does today. You are a citizen of the most empire-minded civilization since civilization began."

Amy also tends to throw money at her problems—and feels a pit in her stomach when a Georgian woman remarks to her that "your child goes to a university that, if I am to believe my eyes, costs more money for one year than I will make in my entire life." Amy reflects critically on the hegemony of the English language and develops an affection for "beautiful flowery Georgian," which she finds "lovely, gentle and lilting."

Still, Amy remains a likable—if occasionally naive—character. *A Dog in Georgia* is proof that a hero's journey need not be haughty and that a political novel can be whimsical and bubbly. In a book ostensibly about animals, Grodstein instead probes the limits of human compassion. As a young Georgian tells Amy, "It is easier for us to care for dogs than it is to care for one another."—AM



Your weekly fix for smart thinking about the world.

A *Foreign Policy* podcast
hosted by editor in
chief **RAVI AGRAWAL**

FOLLOW FP LIVE WHEREVER YOU LISTEN:





When Vegetarian Turns Vigilante

Strict dietary edicts have spawned a wave of hostility toward meat-eaters in Modi's India.

By Salil Tripathi

S ometime in 2014, Indian writer V. Gangadhar was at the crowded Kuwait Airways counter at New York's John F. Kennedy International Airport, annoyed that his flight to Mumbai had been canceled. Tempers were short. Gangadhar was tired and diabetic. His wife was anxious. He needed to eat, but the cafe was some distance away. Suddenly, a woman turned up and offered him *masala puri*, chutneys, and biscuits.

She was Gujarati. "I heard you talking," she said. "We have diabetics in our family," and smiled.

Gangadhar later wrote: "I was not surprised at her kindness to a stranger—during my long years in Gujarat I have experienced this sort of warm consideration for others." He recalled Gujarati kitchens preparing food for the drought-affected, even feeding starving cattle.

You don't have to look far to witness Gujarati generosity. Take any Indian train journey, with its erratic schedules, unscheduled stops, noisy passengers, and endless rounds of tone-deaf Bollywood singing—but if you're lucky, you will have Gujarati passengers traveling with you.

Once the train leaves Mumbai Central, heading north, and reaches Palghar, Gujaratis will open their round steel boxes and bring out delicious *khakhras*



(crisp flatbreads) or *theplas* (the limper version spiced with fenugreek), served with *chhundo*, the grated mango pickle that can be hot and sweet at the same time. There might be salty *ganthia*, the specialty of Bhavnagar and far tastier than nachos. And there will always be a thermos of sweetened *masala chai*, with ginger and cardamom.

“We are a giving people,” veteran Gujarati columnist Gunvant Shah told me at his home in Vadodara, insisting I have another helping of his wife’s *dhokla*, a velvety soft, steamed cake made from fermented rice batter. That afternoon, we also had *gol papdi*, sweetened with jaggery. “Gujarati families on a train journey are [a] godsend because we always offer our food to our neighbors,” Shah said. “We share our food with everybody.”

But what he didn’t add is that some Gujaratis won’t eat others’ food and—more ominously—might seek to prevent strangers from eating their own food if it’s something Gujaratis don’t approve of.

Delhi-based academic Rita Kothari agrees that Gujaratis are generous with their food. “But,” she noted, “there are two stages that follow which you mustn’t forget. They then require others to eat similar food. And then there is the third stage, where they expect compliance. In other words: ‘You must eat like us.’”

We appropriate food and replicate it, and we then demand what’s not available elsewhere. We travel to Denmark and demand *dhokla*; go to Paris and insist on *patra*; we go to Rome and want *ras puri*. We travel with our cooks, and theplas are our constant companions.

The wealth of the Gujarati community has bolstered its assertiveness, which borders on arrogance. And that assertiveness is wielded to impose vegetarianism on those who may prefer to eat meat. Although not every Gujarati is vegetarian, the dominant castes—Brahmins in particular but also the numerically small but economically influential Jains—have flaunted their intolerance.

They have imposed strict rules in their communities about who can eat and cook what and, more importantly, what kind of food they can order in from delivery companies. There have been cases of meat-eaters being hounded, motor scooter tires deflated, and the food checked before the courier is allowed

in. More dangerously, cow-protecting vigilantes have beaten up people suspected of dealing with animal products.

There is no single, binding prohibition on meat-eating in Hinduism. While certain castes and sects describe themselves as “strictly” or “pure” vegetarian, many Hindus eat meats of various types. The enduring myth that all Gujaratis are vegetarian is a stereotype that took hold first because of the power of Jain kings and ministers and later because of the influence of Mohandas Gandhi, India’s founding father.

Gandhi believed in vegetarianism, and he sought to persuade meat-eaters to give up meat. Gandhi’s vegetarianism came out of the idea of *ahimsa*, which prohibited killing. His argument was ethical, not self-righteous. “The only method I know of protecting the cow is that I should approach my Mahomedan brother and urge him for the sake of the country to join me in protecting her. It is not religion, but want of it, to kill a Muslim brother in order to save a cow,” Gandhi wrote.

Today’s Hindu-nationalist Gujaratis believe in using force. A Human Rights Watch report from 2019 found that, between 2015 and 2018, at least 44 people, 36 of them Muslim, were killed by vigilante cow-defenders across India. In the state of Gujarat, there was one known instance of killing and at least nine serious injuries. In 2017, Gujarat also passed one of the stiffest laws in India to protect cows by increasing punishments, and Pradeepsinh Jadeja, the state’s then-home minister, said in response, “We have equaled the killing of a cow or cow progeny with the killing of a human being.”

Gujaratis do eat meat; they just don’t speak about it openly. According to the Indian government, some 40 percent of Gujaratis regularly eat meat, and there may be more who conceal their carnivorous consumption. (With its 1,000-mile coastline—the longest of any Indian state—and hundreds of thousands of people engaged in fisheries, Gujarat has a thriving seafood business.)

Nearly 7 percent of Gujarat’s population is Dalit, and some 15 percent are from Scheduled Tribes. Then there are Christians, who form about 0.5 percent, and another 10 percent are Muslim. It is extravagant to claim that the remaining two-thirds of Gujaratis are vegetarian.

But the strong opposition to meat-eating compels meat-eaters to do it quietly. The hegemony of Jain and dominant-caste Hindu perspectives imposes silence, creating an illusion of majority and conformity. In fact, while Jains are dominant politically and financially, they form only 1 percent of Gujarat’s population, according to the 2011 Indian census.

Narendra Modi’s Hindu-nationalist Bharatiya Janata Party has now ruled Gujarat almost uninterrupted since 1995 (with Modi himself being the chief minister from 2001 to 2014, before he became prime minister), and that continuous rule has solidified the assertiveness of vegetarians, making it difficult for restaurants to serve meat in many areas.

Some Gujaratis won’t eat others’ food and—more ominously—might seek to prevent strangers from eating their own food if it’s something Gujaratis don’t approve of.

Even outside Gujarat, the power and influence of wealthy vegetarians remain. Gujaratis have been an important wealth-generating community in Mumbai—a polyglot, cosmopolitan city. Many Gujarati Jains live in the posh Walkeshwar area of south Mumbai, in co-op buildings overlooking Marine Drive.

Anyone suspected of being a meat-eater would find it harder to buy or rent in these buildings, which passed bylaws first banning the cooking of meat and then even the consumption of it. Nearby shops selling eggs found Gujarati customers turning away from them, so eggs were removed from shelves. Restaurants stopped serving meat, and food delivery companies would not deliver meat dishes to apartments in certain areas.

Prominent Gujaratis in India's film industry have depicted these dynamics on the screen.

Filmmaker Paromita Vohra, who is part Gujarati, made a short film in 2004 called *Cosmopolis: Two Tales of a City*, which captured the emerging intolerance of meat. In the film, Sucheta Telang, a Marathi woman, explains the city's welcoming nature: "Anyone who comes to Bombay, immediately the person is accepted. We never feel that he is an outsider."

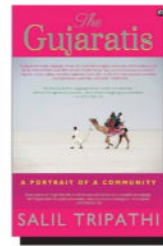
But the film then shows the cultural clash that began when new Gujarati neighbors moved into her apartment building. They told the fishmonger not to come to the building anymore. Then meat delivery stopped, and cooking meat virtually vanished. In some buildings, security guards and even residents check the garbage of their neighbors for bones.

What gives vegetarian Gujaratis the confidence to outlaw meat-eating from a building is the power that money brings. "We wear vegetarianism on our sleeves, but this has become vegetarian fascism," actor Ratna Pathak Shah said.

The pressure within Gujarat is even greater. For decades, the Bengal Cultural Association in Ahmedabad, the largest city in the state, had celebrated Durga Puja with a Bengali feast including Mughlai *paratha*, chicken rolls, prawn *pakoda*, mutton *biryani*, and chicken *chaap*. But in 2018, the festival was forced to go vegetarian after the owners of the venue told them to stop serving meat.

The Gujarati disgust toward meat-eating is deep-rooted and stoked continuously by political and religious leaders. "Those who eat meat act differently," Modi told a journalist in the 1990s.

Hindu stereotyping of Muslims based on their dietary preferences and practices such as animal sacrifice have aroused disgust that, combined with moral indignation, leads to marginalization, stigmatization, dehumanization, and, ultimately, violence. As Parvis Ghassem-Fachandi, an anthropologist at Rutgers University, has written, "Contemporary vegetarianism in Gujarat is defined in its relation to disgust, anger and national identification."



This article is adapted from *The Gujaratis: A Portrait of a Community* by Salil Tripathi (Aleph Book Co., 744 pp., December 2024).

There are also influential books such as Gopinath Aggarwal's *Vegetarian or Non-Vegetarian: Choose Yourself*, available widely in Ahmedabad. The book offers a grab bag of arguments justifying vegetarianism—nutritional and financial analysis, health hazards, and moral and spiritual arguments. And then there is a section purporting to be the autobiography of a slaughtered goat. That story begins harmlessly; humans treat the goat affectionately after he is born, giving him tender leaves to eat, petting him gently. When the goat gets older, he is taken away with 50 other goats in a van. When they stop, a "tall, bearded man" takes them away.

There is not much subtlety; the man committing the slaughter of the goat is described such that he could only be a Muslim. By depicting animal slaughter as a Muslim practice and considering it impure, this parable reinforces the demonization of Muslims.

The story has practical consequences.

Many parts of India prevent the sale of meat during periods when there are Hindu or Jain festivals. Some states have passed laws under the excuse of improving hygienic conditions so that animal slaughter and the sale of meat products are more stringently regulated, especially near Hindu temples.

In some states, vendors or cafes are required to display the owners' names, presumably so that non-Muslim customers can avoid patronizing Muslim shops or restaurants.

Friendly Gujaratis may continue to offer other passengers their delectable snacks and food. But they won't eat their neighbors' food. And they will expect others to conform, imposing vegetarianism and turning food into a manifestation of political hegemony. ■

SALIL TRIPATHI is the author of *The Colonel Who Would Not Repent: The Bangladesh War and Its Unquiet Legacy* and *The Gujaratis: A Portrait of a Community*.

THE HUNGRY HEGEMON is a recurring feature on the politics of food. Read more from the series at ForeignPolicy.com/HungryHegemon.

What in the World?

By Drew Gorman

The following is adapted from past editions of FP's weekly online news quiz. Test yourself every week at ForeignPolicy.com.

1. Around what time on June 21 did U.S. President Donald Trump announce on social media that U.S. bombers had struck Iranian nuclear facilities?

- a. 6:30 p.m. EDT
- b. 7:50 p.m. EDT
- c. 9:25 p.m. EDT
- d. 10:40 p.m. EDT

2. Brazil's Congress on June 25 nullified a presidential decree for the first time since what year?

- a. 1926
- b. 1944
- c. 1980
- d. 1992



3. With which two countries did Poland reinstate border controls in early July?

- a. Slovakia and the Czech Republic
- b. Ukraine and Belarus
- c. Germany and Lithuania
- d. Slovakia and Belarus

4. Ukrainian President Volodymyr Zelensky appointed a new prime minister on July 17. Whom did he choose for the position?

- a. Economics Minister Yulia Svyrydenko
- b. Defense Minister Rustem Umerov
- c. Foreign Minister Andriy Sybiha
- d. Energy Minister German Galushchenko



5. What sparked renewed armed conflict between Thailand and Cambodia along their shared border on July 24?

- a. An attack on a Cambodian hospital
- b. A land mine explosion the previous day
- c. Airstrikes against the Preah Vihear temple
- d. A confrontation in a contested border area



6. At the end of July, which website did Australia add to its list of social media platforms that must ensure account holders be at least 16 years old?

- a. Pinterest
- b. Instagram
- c. YouTube
- d. Facebook

7. South African authorities said in early August that U.S. tariffs had put roughly how many South African jobs at risk?

- a. 15,000
- b. 60,000
- c. 45,000
- d. 30,000



8. Japan recorded its highest-ever temperature on Aug. 5. What figure was reached, in degrees Fahrenheit?

- a. 107.2
- b. 110.1
- c. 104.5
- d. 114.6

9. U.K. Prime Minister Keir Starmer announced on June 15 that which British intelligence agency was getting its first female chief?

- a. MI5
- b. MI6
- c. Defence Intelligence
- d. Homeland Security Group

10. Who was announced as the winner of the men's Tour de France cycling race on July 27?

- a. Slovenia's Tadej Pogacar
- b. Denmark's Jonas Vingegaard
- c. Germany's Florian Lipowitz
- d. The United Kingdom's Oscar Onley



ANSWERS: 1. b, 2. d, 3. c, 4. a, 5. b, 6. c, 7. d, 8. a, 9. a, 10. a

New Rules For a Broken System

Hear from the players
challenging the rules of
global governance.



A NEW PODCAST PRODUCED BY FP STUDIOS WITH
SUPPORT FROM FORD FOUNDATION, COMING SOON.

FP

Ford
Foundation